

APPENDIX A

Directions to Carlisle Town Hall, 66 Westford Street, Carlisle, Massachusetts

The Town of Carlisle is surrounded by Acton, Bedford, Billerica, Chelmsford, Concord and Westford. It is accessible by Route I-95/128 (Exit 31B Route 225/4 to Bedford and Carlisle) and also from Route I-495.

Town Hall is at 66 Westford Street, Route 225, and is a yellow building on a hill, adjacent to the Fire Station. It is a short distance from the intersection of Concord and Lowell Streets.

APPENDIX B

2014	Massachusetts Area Planning Council Carlisle Profile
2010	United States Census Data for the Town of Carlisle
2008-2012	American Community Survey Data for the Town of Carlisle



A partnership between the Metropolitan Area Planning Council & the Boston Indicators Project at the Boston Foundation

Carlisle Community Snapshot

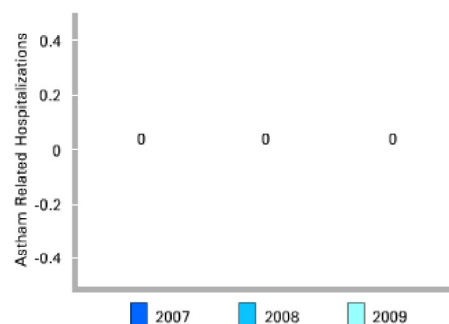
Carlisle is categorized by MAPC as a Country Suburb. These communities have very low housing density, with no significant mixed-use town center and no compact neighborhoods. They have large amounts of vacant developable land, and new growth largely takes the form of conventional low-density subdivisions developed on vacant land, or auto-oriented office and industrial parks. They are generally growing rapidly in percentage terms.



Public Health

Asthma Related Hospitalizations

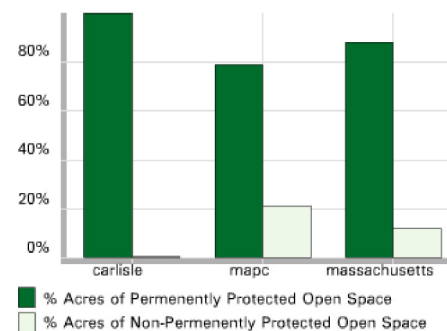
Year(s): 2007-09 • Source: MA DPH



Environment & Energy

Available Open Space

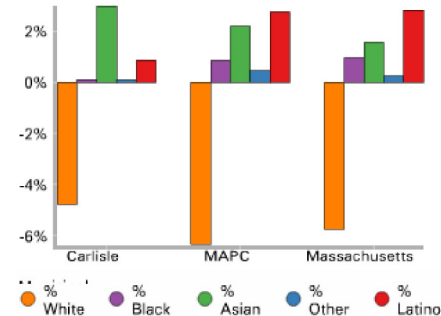
Year(s): 2012 • Source: MassGIS



Demographics

Change in Racial/Ethnic Share

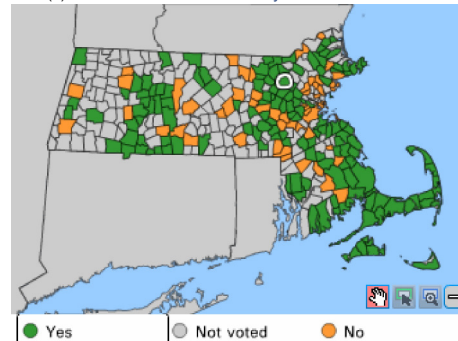
Year(s): 2000,2010 • Source: Census



Civic Vitality & Governance

Community Preservation Act Votes

Year(s): 2011 • Source: Community Preservation Coalition

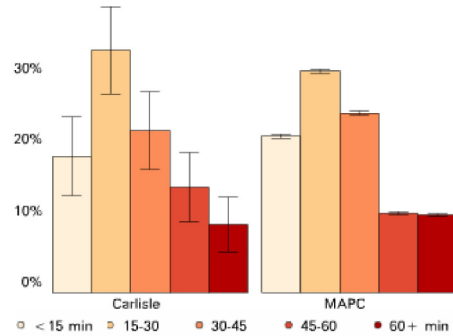


Transportation

Education

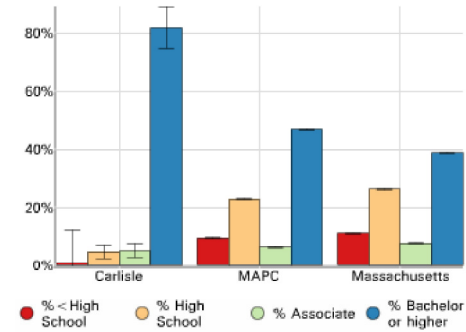
Commute Time to Work

Year(s): 5yr Avg 2007-11 • Source: ACS



Educational Attainment, 25+ years

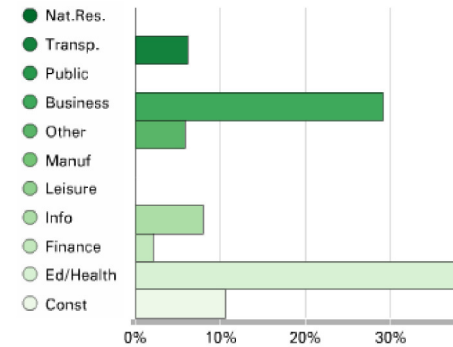
Year(s): 5yr Avg 2007-11 • Source: ACS



Economy

Employment by Sectors

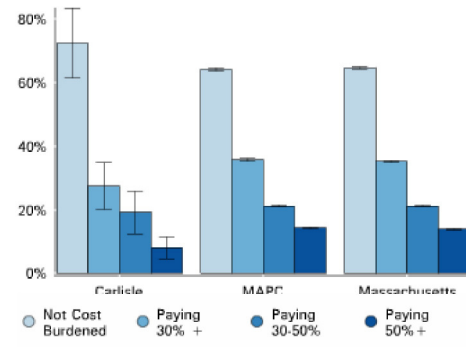
Year(s): 2010 • Source: MA EOLWD ES-202



Housing

Owners Housing Cost Burden

Year(s): 5yr Avg 2007-11 • Source: ACS



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**Comparison, Carlisle Housing Data, 2000 U.S. Census with 2010 US Census and the 2005-2009
American Community Survey**

November 8, 2011

Description	2000 US Census	American Community Survey 2005-2009
Housing Stock		
Total Housing Units	1,655	1740 (Note 3)
Owner-Occupied units	1,518	1,458
Renter-Occupied units		
One unit attached	20	13
Two units attached	38	10
Three or four units	12	23
Five to 9 units	6	0
Renter-Occupied units Total (Note 1)	100	139
Average household size, owner- occupied unit	2.96	3.08
Average household size, renter-occupied unit	2.30	2.30
Rent as % of income (number of households)		
<15 to 19.9%	42	22
20 to 24.9%	5	11
25 to 29.9%	0	21
30 to 34.9%	19	13
35% or more	7	72
No data	17	N/A
Homeowners with mortgage	918	1,077
Housing mortgage cost as percentage of income		
Less than 20%	672	451
20 to 30%	296	283
30 to 34.5%	66	122
35% or more	252	221
Housing units without mortgage	374	381
Median of selected monthly owner costs		
With a mortgage	\$2,570	\$3,511
Without a mortgage	\$710	\$1,000+
Income		
Median adjusted income	\$129,811	\$160,903
Per capita income	\$59,559	\$66,277
Households with incomes \$200,000 or more	388	638
Households below poverty level, all (Note 2)	1.5%	1.7%
Residents 65 years and older below the poverty level (Note 2)	0%	8.4%
Mean household income (dollars)	\$146,819	\$198,100
Income – Total Households (Note 4)	1628	1597
Less than \$10,000	29	11
\$10,000 to \$14,999	36	21
\$15,000 to \$24,999	105	69
\$25,000 to \$34,999	67	0

Comparison, Carlisle Housing Data, 2000 U.S. Census with 2010 US Census and the 2005-2009**American Community Survey****November 8, 2011**

\$35,000 to \$49,999	75	48
\$50,000 to \$74,999	158	126
\$75,000 to \$99,999	148	154
\$100,000 to \$149,999	314	301
\$150,000 to \$199,999	292	229
\$200,000 or more	404	638
Number of 2005-2009 ACS Households earning \$49,999 or less (Note 5)		149 (9.3%)

Note 1: Rental units reported in Census data do not add to totals.

Note 2: Poverty level defined as per capita income under \$10,890 (2011).

Note 3: This figure is from the 2010 US Census.

Note 4: The 2000 US Census Figure is from 1999.

Note 5: The 2010 Housing and Urban Development (HUD) Area Median "Low Income" figure for a family of two in Carlisle was \$ 36,750. The HUD "Low Income figure" for a family of four it was \$64,400.



ARIZONA

NEW MEXICO

OKLAHOMA

ARKANSAS

TENNESSEE

NORTH CAROLINA

SOUTH CAROLINA

DP03

SELECTED ECONOMIC CHARACTERISTICS

2008-2012 American Community Survey 5-Year Estimates

Supporting documentation on code lists, subject definitions, data accuracy, and statistical testing can be found on the American Community Survey website in the Data and Documentation section.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the Methodology section.

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, it is the Census Bureau's Population Estimates Program that produces and disseminates the official estimates of the population for the nation, states, counties, cities and towns and estimates of housing units for states and counties.

Subject	Carlisle town, Middlesex County, Massachusetts			
	Estimate	Margin of Error	Percent	Percent Margin of Error
EMPLOYMENT STATUS				
Population 16 years and over	3,906	+/-148	3,906	(X)
In labor force	2,579	+/-224	66.0%	+/-4.8
Civilian labor force	2,579	+/-224	66.0%	+/-4.8
Employed	2,420	+/-231	62.0%	+/-5.0
Unemployed	159	+/-62	4.1%	+/-1.6
Armed Forces	0	+/-12	0.0%	+/-0.9
Not in labor force	1,327	+/-190	34.0%	+/-4.8
Civilian labor force	2,579	+/-224	2,579	(X)
Percent Unemployed	(X)	(X)	6.2%	+/-2.4
Females 16 years and over	1,996	+/-108	1,996	(X)
In labor force	1,151	+/-152	57.7%	+/-6.4
Civilian labor force	1,151	+/-152	57.7%	+/-6.4
Employed	1,090	+/-150	54.6%	+/-6.4
Own children under 6 years	168	+/-62	168	(X)
All parents in family in labor force	69	+/-45	41.1%	+/-22.4
Own children 6 to 17 years	965	+/-143	965	(X)
All parents in family in labor force	527	+/-125	54.6%	+/-9.6
COMMUTING TO WORK				
Workers 16 years and over	2,407	+/-232	2,407	(X)
Car, truck, or van -- drove alone	1,802	+/-197	74.9%	+/-6.2
Car, truck, or van -- carpooled	157	+/-84	6.5%	+/-3.4
Public transportation (excluding taxicab)	58	+/-37	2.4%	+/-1.5
Walked	16	+/-18	0.7%	+/-0.7
Other means	20	+/-32	0.8%	+/-1.3
Worked at home	354	+/-154	14.7%	+/-5.9
Mean travel time to work (minutes)	30.1	+/-2.2	(X)	(X)
OCCUPATION				
Civilian employed population 16 years and over	2,420	+/-231	2,420	(X)

Subject	Carlisle town, Middlesex County, Massachusetts			
	Estimate	Margin of Error	Percent	Percent Margin of Error
Management, business, science, and arts occupations	1,659	+/-234	68.6%	+/-5.4
Service occupations	187	+/-67	7.7%	+/-2.7
Sales and office occupations	321	+/-95	13.3%	+/-4.0
Natural resources, construction, and maintenance occupations	99	+/-51	4.1%	+/-2.1
Production, transportation, and material moving occupations	154	+/-61	6.4%	+/-2.5
INDUSTRY				
Civilian employed population 16 years and over	2,420	+/-231	2,420	(X)
Agriculture, forestry, fishing and hunting, and mining	15	+/-16	0.6%	+/-0.7
Construction	150	+/-70	6.2%	+/-2.8
Manufacturing	498	+/-115	20.6%	+/-4.6
Wholesale trade	8	+/-12	0.3%	+/-0.5
Retail trade	136	+/-61	5.6%	+/-2.5
Transportation and warehousing, and utilities	39	+/-26	1.6%	+/-1.1
Information	92	+/-56	3.8%	+/-2.3
Finance and insurance, and real estate and rental and leasing	191	+/-85	7.9%	+/-3.3
Professional, scientific, and management, and administrative and waste management services	608	+/-148	25.1%	+/-6.0
Educational services, and health care and social assistance	460	+/-129	19.0%	+/-4.6
Arts, entertainment, and recreation, and accommodation and food services	128	+/-63	5.3%	+/-2.6
Other services, except public administration	62	+/-37	2.6%	+/-1.5
Public administration	33	+/-30	1.4%	+/-1.2
CLASS OF WORKER				
Civilian employed population 16 years and over	2,420	+/-231	2,420	(X)
Private wage and salary workers	1,816	+/-199	75.0%	+/-5.7
Government workers	245	+/-89	10.1%	+/-3.2
Self-employed in own not incorporated business workers	359	+/-121	14.8%	+/-4.7
Unpaid family workers	0	+/-12	0.0%	+/-1.4
INCOME AND BENEFITS (IN 2012 INFLATION-ADJUSTED DOLLARS)				
Total households	1,796	+/-87	1,796	(X)
Less than \$10,000	58	+/-52	3.2%	+/-2.9
\$10,000 to \$14,999	80	+/-39	4.5%	+/-2.1
\$15,000 to \$24,999	18	+/-20	1.0%	+/-1.1
\$25,000 to \$34,999	28	+/-32	1.6%	+/-1.7
\$35,000 to \$49,999	53	+/-35	3.0%	+/-1.9
\$50,000 to \$74,999	105	+/-59	5.8%	+/-3.2
\$75,000 to \$99,999	182	+/-65	10.1%	+/-3.5
\$100,000 to \$149,999	314	+/-88	17.5%	+/-4.9
\$150,000 to \$199,999	266	+/-76	14.8%	+/-4.2
\$200,000 or more	692	+/-96	38.5%	+/-5.2
Median household income (dollars)	160,000	+/-16,657	(X)	(X)
Mean household income (dollars)	205,298	+/-19,698	(X)	(X)
With earnings	1,512	+/-113	84.2%	+/-4.9
Mean earnings (dollars)	190,573	+/-18,739	(X)	(X)
With Social Security	459	+/-96	25.6%	+/-5.4
Mean Social Security income (dollars)	19,496	+/-2,508	(X)	(X)
With retirement income	332	+/-78	18.5%	+/-4.4
Mean retirement income (dollars)	46,304	+/-11,641	(X)	(X)
With Supplemental Security Income	12	+/-19	0.7%	+/-1.0
Mean Supplemental Security Income (dollars)	6,867	+/-16	(X)	(X)
With cash public assistance income	11	+/-17	0.6%	+/-1.0

Subject	Carlisle town, Middlesex County, Massachusetts			
	Estimate	Margin of Error	Percent	Percent Margin of Error
Mean cash public assistance income (dollars)	3,327	+/-12	(X)	(X)
With Food Stamp/SNAP benefits in the past 12 months	24	+/-27	1.3%	+/-1.5
Families	1,512	+/-90	1,512	(X)
Less than \$10,000	38	+/-47	2.5%	+/-3.1
\$10,000 to \$14,999	24	+/-26	1.6%	+/-1.7
\$15,000 to \$24,999	18	+/-20	1.2%	+/-1.3
\$25,000 to \$34,999	0	+/-12	0.0%	+/-2.3
\$35,000 to \$49,999	42	+/-30	2.8%	+/-2.0
\$50,000 to \$74,999	84	+/-52	5.6%	+/-3.4
\$75,000 to \$99,999	152	+/-62	10.1%	+/-4.0
\$100,000 to \$149,999	241	+/-77	15.9%	+/-4.9
\$150,000 to \$199,999	264	+/-75	17.5%	+/-5.0
\$200,000 or more	649	+/-94	42.9%	+/-6.0
Median family income (dollars)	176,310	+/-21,200	(X)	(X)
Mean family income (dollars)	223,086	+/-21,508	(X)	(X)
Per capita income (dollars)	75,856	+/-7,368	(X)	(X)
Nonfamily households	284	+/-84	284	(X)
Median nonfamily income (dollars)	78,750	+/-51,021	(X)	(X)
Mean nonfamily income (dollars)	106,905	+/-36,642	(X)	(X)
Median earnings for workers (dollars)	75,714	+/-13,371	(X)	(X)
Median earnings for male full-time, year-round workers (dollars)	133,333	+/-13,528	(X)	(X)
Median earnings for female full-time, year-round workers (dollars)	86,020	+/-11,683	(X)	(X)
HEALTH INSURANCE COVERAGE				
Civilian noninstitutionalized population	4,870	+/-18	4,870	(X)
With health insurance coverage	4,737	+/-91	97.3%	+/-1.8
With private health insurance	4,527	+/-145	93.0%	+/-2.9
With public coverage	822	+/-169	16.9%	+/-3.5
No health insurance coverage	133	+/-90	2.7%	+/-1.8
Civilian noninstitutionalized population under 18 years	1,133	+/-156	1,133	(X)
No health insurance coverage	18	+/-28	1.6%	+/-2.4
Civilian noninstitutionalized population 18 to 64 years	3,060	+/-203	3,060	(X)
In labor force:	2,363	+/-223	2,363	(X)
Employed:	2,204	+/-227	2,204	(X)
With health insurance coverage	2,166	+/-238	98.3%	+/-1.6
With private health insurance	2,129	+/-240	96.6%	+/-2.3
With public coverage	78	+/-50	3.5%	+/-2.3
No health insurance coverage	38	+/-33	1.7%	+/-1.6
Unemployed:	159	+/-62	159	(X)
With health insurance coverage	118	+/-50	74.2%	+/-20.8
With private health insurance	118	+/-50	74.2%	+/-20.8
With public coverage	0	+/-12	0.0%	+/-19.6
No health insurance coverage	41	+/-40	25.8%	+/-20.8
Not in labor force:	697	+/-132	697	(X)
With health insurance coverage	661	+/-127	94.8%	+/-4.5
With private health insurance	617	+/-128	88.5%	+/-9.4
With public coverage	81	+/-60	11.6%	+/-8.4
No health insurance coverage	36	+/-33	5.2%	+/-4.5

Subject	Carlisle town, Middlesex County, Massachusetts			
	Estimate	Margin of Error	Percent	Percent Margin of Error
PERCENTAGE OF FAMILIES AND PEOPLE WHOSE INCOME IN THE PAST 12 MONTHS IS BELOW THE POVERTY LEVEL				
All families	(X)	(X)	4.6%	+/-3.7
With related children under 18 years	(X)	(X)	8.7%	+/-7.6
With related children under 5 years only	(X)	(X)	0.0%	+/-56.2
Married couple families	(X)	(X)	3.5%	+/-3.6
With related children under 18 years	(X)	(X)	6.1%	+/-7.6
With related children under 5 years only	(X)	(X)	0.0%	+/-56.2
Families with female householder, no husband present	(X)	(X)	38.8%	+/-42.8
With related children under 18 years	(X)	(X)	67.9%	+/-50.5
With related children under 5 years only	(X)	(X)	-	**
All people	(X)	(X)	6.0%	+/-3.7
Under 18 years	(X)	(X)	6.5%	+/-5.4
Related children under 18 years	(X)	(X)	6.5%	+/-5.4
Related children under 5 years	(X)	(X)	0.0%	+/-27.7
Related children 5 to 17 years	(X)	(X)	7.2%	+/-5.9
18 years and over	(X)	(X)	5.9%	+/-3.5
18 to 64 years	(X)	(X)	5.9%	+/-3.8
65 years and over	(X)	(X)	5.5%	+/-4.7
People in families	(X)	(X)	5.0%	+/-3.9
Unrelated individuals 15 years and over	(X)	(X)	17.4%	+/-11.3

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

There were changes in the edit between 2009 and 2010 regarding Supplemental Security Income (SSI) and Social Security. The changes in the edit loosened restrictions on disability requirements for receipt of SSI resulting in an increase in the total number of SSI recipients in the American Community Survey. The changes also loosened restrictions on possible reported monthly amounts in Social Security income resulting in higher Social Security aggregate amounts. These results more closely match administrative counts compiled by the Social Security Administration.

Workers include members of the Armed Forces and civilians who were at work last week.

Industry codes are 4-digit codes and are based on the North American Industry Classification System 2007. The Industry categories adhere to the guidelines issued in Clarification Memorandum No. 2, "NAICS Alternate Aggregation Structure for Use By U.S. Statistical Agencies," issued by the Office of Management and Budget.

While the 2008-2012 American Community Survey (ACS) data generally reflect the December 2009 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities.

Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2000 data. Boundaries for urban areas have not been updated since Census 2000. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Source: U.S. Census Bureau, 2008-2012 American Community Survey

Explanation of Symbols:

1. An '***' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.
2. An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.
3. An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.

4. An '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.
5. An '****' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended distribution. A statistical test is not appropriate.
6. An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.
7. An 'N' entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.
8. An '(X)' means that the estimate is not applicable or not available.

APPENDIX C

2010 Town of Carlisle Housing Production Plan – Executive Summary

TOWN OF CARLISLE HOUSING PRODUCTION PLAN

Members of the Carlisle Housing Production Plan Committee

James Bohn, Carlisle Housing Authority
David Freedman, Carlisle Planning Board
Timothy Hult, Carlisle Board of Selectmen
Tom Lane, Carlisle Planning Board
Alan Lehotsky, Carlisle Housing Authority
John Williams, Carlisle Board of Selectmen, Committee Chair

Elizabeth DeMille Barnett, Carlisle Housing Coordinator

November 2, 2010

TOWN OF CARLISLE HOUSING PRODUCTION PLAN

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TOWN OF CARLISLE HOUSING PRODUCTION PLAN

I. EXECUTIVE SUMMARY

A. Introduction

Carlisle is a residential community approximately 25 miles northwest of Boston, between the inner and outer beltways of Interstate I-95/MA Route 128 and Interstate 495 and the radial MA Routes 2 and 3. Carlisle has a strong commitment to maintaining its rural, small village character and prides itself on its history, schools, and distinct sense of place. The social and physical focus of the town is Carlisle Center. However, the distinctive physical and historical elements of Carlisle are widely spread throughout town, with open vistas, tree-canopied roads, and farming structures reflecting the town's rural history and character.

Population growth has put significant pressures on the housing market. Almost all housing units in Carlisle are owner-occupied, single-family houses, with a median sale price now well above \$700,000. Because the town has no public water or sewer, and because of the extensive wetland and ledge found here, these lots typically have at least two acres. The escalating housing prices in the current market are attracting greater attention from private developers interested in Chapter 40B development. Town leaders and residents now recognize that different strategies are required to better plan for housing development that is more directed to serving local needs and objectives.

Based on the most recent data (per 2000 U.S. Census) from the Massachusetts Department of Housing and Community Development (DHCD) on the Chapter 40B Subsidized Housing Inventory, Carlisle had 1,647 year-round housing units, of which 18 could be counted as affordable,¹ representing 1.09% of the year-round housing stock. According to Chapter 40B regulations, if a municipality has less than 10% of its year-round housing set-aside for low- and moderate-income residents, it is not meeting the state standard for affordable housing. Carlisle is therefore vulnerable to losing control over housing development through Chapter 40B comprehensive permit applications that can override local zoning. To meet the 10% standard, at least 165 of the existing units would have to be "affordable" based on the state's definition, requiring at least another 147 more housing units to be converted to affordable units in Carlisle. Assuming future housing growth, this 10% figure is a moving target; the required minimum number of year-round units will increase with 2010 Census figures.

Undertaking a more proactive housing program to build more affordable housing will be a significant challenge in Carlisle for many reasons, including the following:

- Concerns about constraints of existing infrastructure such as the lack of public water and sewer;
- A school building complex that is currently in poor condition and in the process of renovation and expansion for certain programs but not adding capacity or allowing for the significant population increases that might come from an influx of new housing development;
- Current zoning that limits denser development;
- The high cost of land that drives development costs higher and makes town land purchases difficult; and
- Financial resources to subsidize affordable housing are limited;

¹ There are currently 20 certified affordable units.

Early in 2005, the Board of Selectmen established the Affordable Housing Plan Task Force to oversee the preparation of an Affordable Housing Plan that would meet the requirements of 760 CMR 31.07 (1)(i) under the state's Planned Production Program and current state requirements of Executive Order 418 Housing Certification. Approval of this plan and then certification based on actual production of affordable units under these regulations would enable the town to deny unwelcome Chapter 40B comprehensive permit applications without developer appeal and to be competitive for state subsidies for transportation, economic development, environment, infrastructure and housing. In 2009, the Selectmen established the Housing Production Plan Committee to update the 2005 Plan.

This Affordable Housing Plan suggests a range of options to meet pressing local housing needs and to bring Carlisle closer to the state 10% threshold and to present a proactive housing agenda of Town-sponsored initiatives. Due to the rising costs of homeownership, many residents are finding it increasingly difficult to afford to remain in Carlisle, including children who would like to raise their own families locally, long-term residents, especially the elderly, and town employees. More housing options are required to meet these local needs and produce Carlisle's fair share of regional needs. Both anecdotal and hard evidence obtained in a 2009 Town Survey as well as the substantial interest expressed by senior residents in being placed on a waiting list for the recently permitted Benfield senior residential project point to a growing need for senior housing in ways that were not readily apparent even five years ago. The high cost of home ownership also indicates a need for affordable rental housing.

B. Housing Goals

The following goals represent the building blocks this updated Housing Production Plan:

- Meet local housing needs along the full range of incomes, promoting social and economic diversity and the stability of individuals and families living in Carlisle;
- Leverage public and private resources to the greatest extent possible;
- Insure that new housing is harmonious with the existing community;
- Meet annual planned production goals for affordable housing, working towards the 10% state standard;
- Provide a wide range of housing alternatives to meet diverse housing needs;
- Promote smart growth development; and
- Preserve the existing affordable housing stock.

C. Summary of Housing Needs Assessment

The Housing Needs Assessment presents an overview of the current housing situation in the town of Carlisle and provides the context within which a responsive set of strategies can be developed to address housing needs and meet production goals. Key findings in regard to household characteristics, housing characteristics, and housing affordability are summarized in the following:

Household Characteristics

- Carlisle is one of the most affluent communities in Massachusetts. The median household income in 1999 was \$129,811, up 55% from the 1989 median income and well above the median income for Middlesex County of \$60,821 and the Boston region of \$55,234.
- Those earning more than \$100,000 almost doubled over the decade between 1989 and 1999—from 583 to 1,010 households – well over what would be expected under normal inflationary trends.
- Despite indications of great wealth, there still remains a population living in Carlisle with limited means. According to 2000 census figures, of the 1,628 total households 237, or 14.6% had incomes at or below 50% of area median income. Further, the poverty rate, while relatively low,

is increasing in Carlisle. Census data indicates in 2000, 111 individuals and 21 families had incomes that would place them below the poverty level.

- The population has remained predominantly White with minority representation at 6.5%, most of Asian descent.
- The town's population is aging. Those 65 years or older comprised 8.4% of residents in 2000, up from approximately 5.7% in 1980. This trend will be shown to be accelerating.
- Almost one-third of all residents are 19 years and younger, somewhat higher than the county level of 25.1% and that for the country as a whole of 25.7%.
- Demographic trends suggest that escalating housing costs may be pricing younger individuals and families out of the housing market. Those entering the labor market and forming new families are dwindling in numbers and reducing the pool of entry-level workers and service employees as well as forcing the grown children who were raised in town to relocate outside of Carlisle.
- There are a number of residents who have special needs and are disabled, including 46 or 3.8% of the school-age population, 185 or 6.6% of those 21 to 64 (about one-quarter of whom could not be employed), and 79 or 19.7% of those 65 years or older.
- More than one-third of the total population moved to a different house during the last five years; such sales tend to accelerate the increase in housing prices.

Housing Characteristics

- The 2000 census counted 1,655 total housing units in the town of Carlisle, up 10.7% from 1,495 units in 1990 and a 56.9% increase from 1,055 units in 1980.
- Carlisle has 1,618 occupied units, of which 93.8% were owner-occupied and 6.2% were rental units. These figures represent a considerably higher level of owner-occupancy than that for Middlesex County as a whole of 61.7% and for the Boston region of 57%.
- The 2000 census indicates that 95% of the existing housing units are in single-family detached structures, a significantly higher percentage than the 49% level for the county and 44% for the Boston region.
- Vacancy statistics from the 2000 census are very low, indicating tight market conditions.
- Almost 800 units, or half of Carlisle's housing stock, were built prior to 1970. Another 37.8% were produced between 1970 and 1990.

Housing Affordability

- Almost 20% of Carlisle residents, or about 350 households, are currently living in housing that is by common definition beyond their means and unaffordable.
- There are no longer homes available for less than \$200,000 that would be affordable to low- and moderate-income households.
- To buy a home at the median sales price \$720,000 requires an income of about \$225,000, significantly more than the town residents' 2000 median income of \$129,811. Approximately 80% of Carlisle's households have an income lower than would be required for a first-time home-buyer at this price level.
- The borrowing power of the average household is about \$420,000, less than the average price of a building lot.
- The affordability gap is about \$300,000 – the difference between the price of the median priced home and what a median income household can afford. The affordability gap almost doubles to \$540,000 for low- and moderate-income households earning at or below 80% of area median income.
- The 2000 census indicated that the median gross rental was \$1,400, significantly higher than the 1990 median rent of \$667, and requiring an income higher than that of about 20% of Carlisle's households. More recent market rentals are significantly higher ranging from \$1,500 for a small apartment to as much as \$4,000 for some houses.

Supply and Demand

- A survey of neighboring communities indicates long waiting times for all types of affordable housing, confirming that the supply does not meet demand, particularly for seniors, others in need of affordable rentals, and disabled residents.
- Local preference considerations in neighboring communities further limit access for Carlisle residents when affordable units do become available in neighboring communities.

D. Summary of Affordable Housing Planned Production Goals

The State administers the Planned Production Program that enables cities and towns to adopt an affordable housing plan that demonstrates production of .50% over one year or 1.0% over two-years of its year-round housing stock eligible for inclusion in the Subsidized Housing Inventory. A municipality may request that the Department certify its compliance with an approved Housing Production Plan (HPP) if it has increased its number of SHI Eligible Housing units in an amount equal to or greater than its 0.50% production goal for that calendar year. SHI Eligible Housing units shall be counted for the purpose of certification in accordance with the provisions for counting units under the SHI set forth in 760 CMR 56.03(2). Requests for certification may be submitted at any time, and the Department shall determine whether a municipality is in compliance within 30 days of receipt of the municipality's request. If the Department determines the municipality is in compliance with its HPP, the certification shall be deemed effective on the date upon which the municipality achieved its numerical target for the calendar year in question, in accordance with the rules for counting units on the SHI set forth in 760 CMR 56.03(2). A certification shall be in effect for a period of one year from its effective date. If the Department finds that the municipality has increased its number of SHI Eligible Housing units in a calendar year by at least 1.0% of its total housing units, the certification shall be in effect for two years from its effective date.

Carlisle will have to produce approximately 8 affordable units annually to meet these production goals through 2010. When the 2010 census figures become available in 2011, this number will be higher, most likely at least 10-12 units. If the State certifies that the locality has complied with its annual production goals, the Town may, through its Zoning Board of Appeals, deny comprehensive permit applications without opportunity for appeal by developers.

Using the strategies summarized under the Housing Action Plan described in Section VI, the Town of Carlisle has developed a Planned Production Program to chart affordable housing production activity over the next five years. The goals are based largely on the following criteria:

- To the greatest extent possible, at least 50% of the units that are developed on Town-owned parcels should be affordable to households earning at or below 80% of area median income and at least another 10% affordable to those earning up to 150% of area median income, depending on project feasibility. The rental projects will also target some households earning at or below 60% of area median income depending upon subsidy program requirements.
- Projections are based on a minimum of four units per acre. However, given specific site conditions and financial feasibility it may be appropriate to increase or decrease density as long as projects are in compliance with state Title V and wetlands regulations.
- Because housing strategies include some development on privately owned parcels, production will involve projects sponsored by private developers through the standard regulatory process or “friendly” comprehensive permit process. The Town plans to

promote increased affordability in these projects, working with developers to incorporate at least 40% of the units as affordable.

- The projections involve a mix of rental and ownership opportunities. The Town will work with private developers to promote a diversity of housing types directed to different populations with housing needs including families, seniors and other individuals with special needs to offer a wider range of housing options for residents.

E. Summary of Housing Action Plan

The strategies outlined below are based on previous plans, reports, studies, the Housing Needs Assessment, and the experience of other comparable localities in the Metro West area and throughout the Commonwealth. The strategies are grouped according to the type of action proposed – Planning and Regulatory Reform, Building Local Capacity, Housing Production, and Housing Preservation.

1. *Implement Planning and Regulatory Reforms*

The Town of Carlisle should consider the following planning and zoning-related strategies to promote the creation of additional affordable units.

- Adopt inclusionary zoning
- Amend Residence District M to allow higher density if tied to a waste water treatment plant
- Promote use of existing bylaw allowing by-right conversion of pre-1962 single-family homes to two-family and consider expanding the Bylaw to allow conversion of post-1962 dwellings
- Waive permit fees for affordable housing projects and streamline the permit approval process

2. *Build Local Capacity*

In order to be able to carry out the strategies included in this Affordable Housing Plan and meet the Planned Production goals, it will be important for the Town of Carlisle to build its capacity to promote affordable housing activities. This capacity includes gaining access to greater resources – financial and technical – as well as building local political support, developing partnerships with public and private developers and lenders, and creating and augmenting local organizations and systems that will support new housing production.

- Conduct educational campaign
- Reestablish the Carlisle Municipal Land Committee
- Provide support to Zoning Board of Appeals
- Continue Annual Housing Summits
- Access new housing resources

3. *Housing Production*

To accomplish the actions included in this Affordable Housing Plan and meet production goals, it will be essential for the Town of Carlisle to reach out to the development community and sources of public and private financing to secure the necessary technical and financial resources. While some of the units produced will rely on the participation of existing homeowners, most of the production will require joint ventures with developers – for profit and non-profit – to create affordable units. In addition to the active participation of the development community, it will be important for Carlisle to

actively seek support from state and federal agencies. The production of a substantial number of new affordable units will likely require subsidies beyond what is available through the Community Preservation Fund.

- Make Town-owned land available for affordable housing
- Incorporate accessory apartments in the Subsidized Housing Inventory
- Support scattered-site housing
- Convert existing housing units to affordability

4. *Housing Preservation*

Housing production is critical, but the Town also needs to be concerned that it does not lose units already counted as part of its Subsidized Housing Inventory and provides resources to support the deferred home maintenance needs of lower income residents, including seniors.

- Monitor affordability of Subsidized Housing Inventory
- Help qualifying homeowners access housing assistance
- Offer additional tax relief to seniors

F. Summary Description of Use Restrictions

Carlisle is committed to maintaining its Subsidized Housing Inventory for as long a period as possible. Deed riders or affordable rental restrictions should assure continued affordability in perpetuity to the greatest extent possible.

II. INTRODUCTION

Carlisle is a residential community approximately 25 miles northwest of Boston, between the inner and outer beltways of Interstate-95/MA Route 128/95 and Interstate 495 and the radial MA Routes 2 and 3. The town is bordered by the six communities of Acton, Bedford, Billerica, Chelmsford, Concord and Westford. Carlisle has a strong commitment to maintaining its rural, small village character and prides itself on its history, schools, and distinct sense of place. The social and physical focus of the town is Carlisle Center that includes a concentration of public services, small businesses and traffic. However, the physical and historical distinctions of Carlisle are widely spread throughout town, with open vistas, canopied roads, and farming structures reflecting the town's rural history and character, highly valued by its citizens.

Population growth has put significant pressures on the housing market, especially between 1950 and 1970 when the population nearly tripled in size. The rate of growth has slowed down since that time, but the town is still gaining new residents who have been accommodated through comparable growth in the housing stock. It is also worth noting that the 12.9% increase in population from 4,923 in 2000 to 5,557 in 2009 is, on a decade basis, an increase over the rate of population growth from 1990 to 2000. Since 1950, however, only 20 affordable units have been produced.² At the time of the 2000 Census, Carlisle had 1,655 housing units,³ almost all of which are owner-occupied, single-family houses on lots that are typically at least two acres with a median sale price for 2009 of \$746,750⁴. The high housing prices, as well as the still high cost of a buildable housing lot in the current market have attracted greater attention

² An additional 26 affordable rental units to be developed on Town-owned land are expected to be built, pursuant to a Comprehensive Permit recently granted by the Carlisle Zoning Board of Appeals.

³ While there are 1,655 total housing units cited in the 2000 census, there were 1,647 year-round housing units on which the 10% state Chapter 40B goal is based.

⁴ The Warren Group, March, 2010

APPENDIX D

338 Bedford Road Surveyor's Map

APPENDIX E

338 Bedford Road Site Context



Master Plan for 338 Bedford Road, Carlisle MA

APPENDIX F

338 Bedford Road Parcel, Carlisle - Deed

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2

Quitclaim Deed

I, **PHYLLIS MOSELEY GOFF f/k/a PHYLLIS E. MOSELEY**, a married woman, of Carlisle, Middlesex County, Massachusetts

for consideration paid and in full consideration of Five Hundred Ninety Thousand and 00/100 (\$590,000.00) Dollars

grant to **THE TOWN OF CARLISLE AFFORDABLE HOUSING TRUST FUND, Under Declaration of Trust, dated October 24, 2006, as evidenced by Trust Certificate recorded herewith**

with quitclaim covenants

A certain parcel of land with the buildings thereon situated in Carlisle, Middlesex County, Massachusetts, being shown as Lot A on a plan entitled "Plan of Land in Carlisle, Massachusetts (Middlesex County) For: Daniel Moseley, Scale: 1" = 40', October 16, 2012, Stamski and McNary, Inc.," said plan to be recorded herewith.

Containing 219,502 square feet of land, according to said plan.

The premises are hereby conveyed to Grantee subject to a perpetual public trust that the Premises may be used only for one or more of the following purposes:

a. active and passive recreational uses including, without limitation, one or more ballfields and one or more tennis courts, basketball courts, trails, fences, game viewing stands, scoreboards, recreational buildings and structures including without limitation a senior center and/or a community center containing recreational facilities, accessory parking, underground fire cisterns, and the like;

b. access and egress to and from Bedford Road, a public way, for either or both of the Premises and abutting land now owned by the Town of Carlisle, commonly known as the Banta Davis Land, containing 38 acres, more or less, including without limitation, any multi-family housing;

c. public and private utilities and services serving either or both of the Premises and/or said abutting Banta Davis Land and any buildings and/or structures which may now or hereafter be located on said Banta Davis Land, including without limitation any multi-family housing, as well as the recreational buildings and/or uses described in (a) above; and/or

d. (i) one single family house, (ii) one or two group home(s) for the developmentally disabled of up to ten (10) bedrooms, total, for all such group homes, and (iii) garages, barns, parking, wells, septic systems, leachfields, drainage, landscaping, lighting, and

Property Address: 388 Bedford Road, Carlisle, MA

similar customary accessory buildings, structures and/or uses serving any of the foregoing purposes (a) through (d).

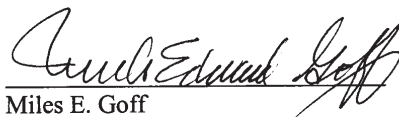
Being a portion of the premises conveyed to me by deed from John A. Davis, recorded with the Middlesex North District Registry of Deeds in Book 1765, Page 130.

No Deed stamps are required under U. Code Section 1.

Witness my hand and seal this ____ day of May, 2013.


Phyllis Moseley Goff

I, **MILES E. GOFF**, Husband of Phyllis Moseley Goff, hereby waive any and all rights of Homestead in the property being conveyed and warrant that there are no other persons entitled to any Homestead rights on the property pursuant to M.G.L. c. 188.


Miles E. Goff

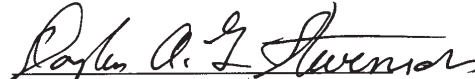
By acceptance and recording of the Deed, the Grantee hereby assents that it is taking title to the Premises subject to the public trust stated herein.

GRANTEE

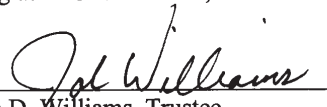
Town of Carlisle Affordable Housing Trust



Greg D. Peterson, Chair and Trustee



Douglas A.G. Stevenson, Trustee

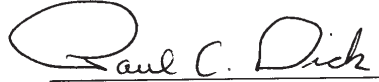


John D. Williams, Trustee

The Commonwealth Of Massachusetts

Middlesex, ss.

On this 10th day of May, 2013, before me, the undersigned notary public, personally appeared the above-named **PHYLLIS MOSELEY GOFF**, proved to me through satisfactory evidence of identification being (check whichever applies): ☐ driver's license or other state or federal governmental document bearing a photographic image, ☐ oath or affirmation of a credible witness known to me who knows the above signatory, or ☒ my own personal knowledge of the identity of the signatory, to be the person whose name IS signed on the preceding document, and acknowledged to me that she signed it voluntarily for its stated purpose.

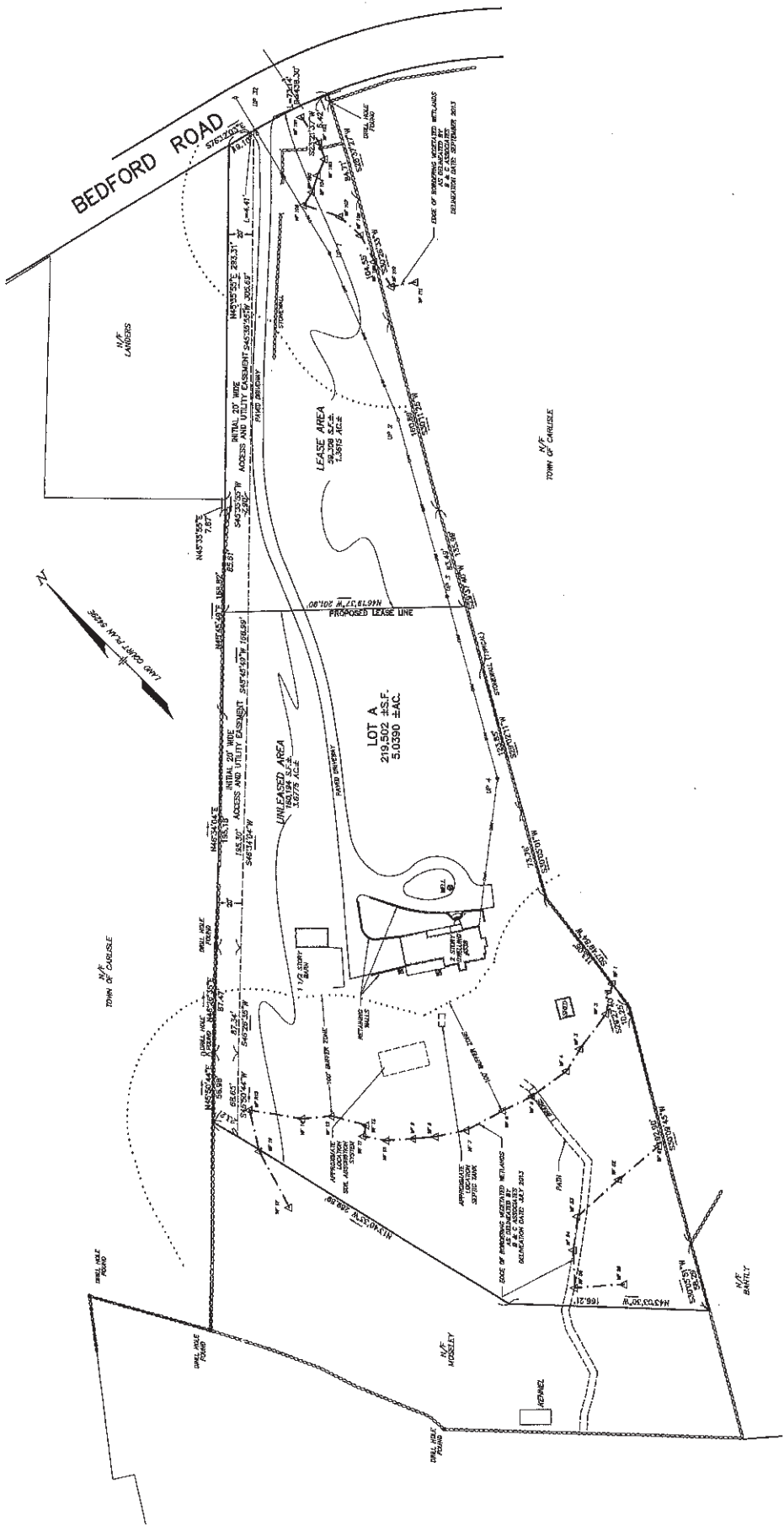


Notary Public - Paul C. Dick

My Commission Expires: 12/29/17

APPENDIX G

Area to be Leased – 338 Bedford Road



PLAN OF LAND
IN
CARLISLE, MASSACHUSETTS
(MIDDLESEX COUNTY)
FOR: **CARLISLE HOUSING AUTHORITY**
SCALE: 1"=40' MARCH 28, 2014
REVISED: JUNE 13, 2014
STAMSKI AND MONARY, INC.
100 MAIN STREET
CARLISLE, MASSACHUSETTS 01301
DRAWING - PLANNING - CONCEPTS
0 20 40 60 80 100 120 140 FT
(500TALEASE2.dwg) Bedford Road SH-5001A

NOTES:
1) THIS PLAN IS BASED ON THE RECORDED PLANS AND AN INTENTED TO MEET THE REQUIREMENTS OF THE RECORDS OF THE TOWN OF CARLISLE. THE CERTIFICATION HEREON IS INTENDED TO MEET THE REQUIREMENTS OF THE RECORDS OF THE TOWN OF CARLISLE. THE CERTIFICATION HEREON IS INTENDED TO MEET THE REQUIREMENTS OF THE RECORDS OF THE TOWN OF CARLISLE. THE CERTIFICATION HEREON IS INTENDED TO MEET THE REQUIREMENTS OF THE RECORDS OF THE TOWN OF CARLISLE.
2) THE PURPOSE OF THIS PLAN IS TO DELINEATE THE LEASE AREA AND INITIAL ACCESS AND UTILITY EASEMENT.

ZONING DISTRICT
RESIDENCE B
PROJECT LOCATION
338 BEDFORD ROAD
TOWN MAP 14 PARCEL 21

RECORD OWNER
THE TOWN OF CARLISLE AFFORDABLE HOUSING TRUST FUND
CARLISLE, MA

REFERENCE
MIDDLESEX REGISTRY OF DEEDS
NORTH DISTRICT
DEED BOOK 27291 PAGE 256
PLAN BOOK 235 PAGE 1



THIS PLAN SHOWS THE PROPERTY LINES THAT ARE THE LINES OF EXISTING OWNERSHIP, AND THE LINES OF STREETS AND WAYS ALREADY ESTABLISHED, AND NO NEW LINES FOR DIVISION OF OWNERSHIP OR FOR NEW WAYS ARE SHOWN. THIS PLAN HAS BEEN PREPARED IN ACCORDANCE WITH THE RULES AND REGULATIONS OF THE REGISTERED DEEDS OF THE COMMONWEALTH OF MASSACHUSETTS.

DATE 6/27/13
REGISTERED PROFESSIONAL LAND SURVEYOR

REGISTERED AND OWNED
MIDDLESEX REGISTRY OF DEEDS
PLAN BOOK 235, PLAN 20
SHORT OF 1
DATE JUNE 27, 2014
BY [Signature]



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NOTICE OF LEASE

In accordance with G.L. c. 183, §4, notice is hereby given of the following described Ground Lease and to provide notice of the referenced Ground Lease:

Commencement Date: June 30, 2014.

Landlord: **Carlisle Affordable Housing Trust**, having a principal place of business at c/o 66 Westford Street, Carlisle, MA 01741. Reference is made to the Vote taken under Article 1 of the November 13, 2012 Special Town Meeting, a certified copy of which is attached hereto and incorporated herein.

Tenant: **Carlisle Housing Authority**, established pursuant to G.L. c. 121B and having a principal place of business at c/o Carlisle Town Hall, 66 Westford Street, Carlisle, MA 01741.

Leased Premises: A certain portion of the Property located at 338 Bedford Road, Carlisle, Massachusetts conveyed to the Carlisle Affordable Housing Trust in a deed recorded with the Middlesex Registry of Deeds in Book 27261, Page 256, consisting of approximately 1.3615 acres (59,308 sq. ft.), more or less, and shown as "Lease Area" on a plan entitled "Plan of Land in Carlisle, Massachusetts (Middlesex County) For: Carlisle Housing Authority" dated March 28, 2014, prepared by Stamski and McNary, Inc., to be recorded herewith.

Term: 99 years, commencing on June 30, 2014.

Extension Term: None.

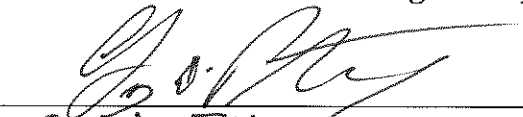
Encumbrances: All matters of record insofar as in force and applicable, together with all rights and easements reserved under the Lease.

[signature page follows]

PROPERTY ADDRESS: 338 BEDFORD ROAD, CARLISLE, MA

Signed under seal as of this 30 day of June, 2014

Carlisle Affordable Housing Trust,

By: 
Its: Chair


Carlisle Housing Authority

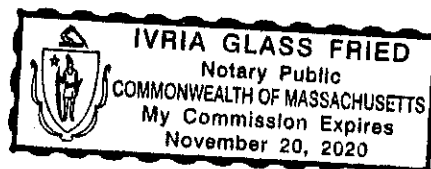
By: 
Its: Chair

COMMONWEALTH OF MASSACHUSETTS

Middlesex, ss

On this 30 day of June, 2014, before me, the undersigned Notary Public, personally appeared the above-named Greg Peterson, member of the Carlisle Affordable Housing Trust, proved to me by satisfactory evidence of identification, being (check whichever applies): ☒ driver's license or other state or federal governmental document bearing a photographic image, ☐ oath or affirmation of a credible witness known to me who knows the above signatory, or ☐ my own personal knowledge of the identity of the signatory, to be the person whose name is signed above, and acknowledged the foregoing to be signed by him/her voluntarily for its stated purpose.


Notary Public
My Commission Expires:

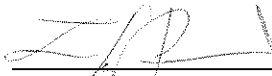


PROPERTY ADDRESS: 338 BEDFORD ROAD, CARLISLE, MA

COMMONWEALTH OF MASSACHUSETTS

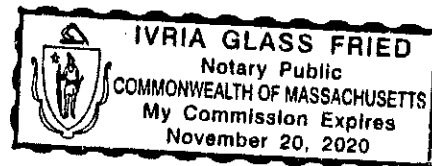
Middlesex, ss

On this 30 day of June, 2014, before me, the undersigned Notary Public, personally appeared the above-named Alan Lehotsky, member of the Carlisle Housing Authority, proved to me by satisfactory evidence of identification, being (check whichever applies): ☒ driver's license or other state or federal governmental document bearing a photographic image, ☐ oath or affirmation of a credible witness known to me who knows the above signatory, or ☐ my own personal knowledge of the identity of the signatory, to be the person whose name is signed above, and acknowledged the foregoing to be signed by him/her voluntarily for its stated purpose.



Notary Public

My Commission Expires: Nov 20, 2020



PROPERTY ADDRESS: 338 BEDFORD ROAD, CARLISLE, MA

APPENDIX H

Phase I Environmental Assessment, Engineering Consulting Resources, Inc., October 15, 2012

**PHASE I ENVIRONMENTAL SITE ASSESSMENT
338 BEDFORD ROAD
CARLISLE, MASSACHUSETTS**



Prepared for:
Mr. George Dimakarakos, P.E.
Stamski & McNary, Inc.
1000 Main Street
Acton, MA 01720

Prepared by:
Engineering & Consulting Resources, Inc.
PO Box 966
Acton, Massachusetts 01720-0966
(978) 500-3199
www.ecr-consulting.com
October 15, 2012

EXECUTIVE SUMMARY

Engineering & Consulting Resources, Inc. (ECR) performed a Phase I Environmental Site Assessment (ESA) for 338 Bedford Road in Carlisle, Massachusetts (the "Property"). The Property is shown on the attached site plan (Figure 2). The 5-acre property is identified in Town of Carlisle records as Map 14, Parcel 21.

The purpose of this ESA was to evaluate the presence or possible presence of Recognized Environmental Conditions at the Property. The Phase 1 ESA was conducted in general accordance with the American Society for Testing and Materials (ASTM) Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process (E1527-05).

The conclusion of this ESA is as follows:

- **Recognized Environmental Conditions were not identified during the ESA.**

The conclusions expressed herein are subject to the Limitations and Exceptions noted in Section 1.3 of this report, the Terms and Conditions referenced in Section 1.4 of this report, in other sections of this report, and in the Agreement between ECR and Stamski & McNary, Inc.

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PHASE I ENVIRONMENTAL SITE ASSESSMENT

338 BEDFORD ROAD
CARLISLE, MASSACHUSETTS

1.0 INTRODUCTION

1.1 PURPOSE

Engineering & Consulting Resources, Inc. (ECR) performed a Phase I Environmental Site Assessment (ESA) for 338 Bedford Road in Carlisle, Massachusetts (the "Property"). The Phase I ESA was prepared in general accordance with the American Society for Testing and Materials (ASTM) Standard Practice for Environmental Site Assessments: Phase I Environmental Site Assessment Process (E1527-05). As stated in E1527-05, an ESA is intended to satisfy one of the requirements of the innocent landowner defense to liability under the Comprehensive Environmental Response, Compensation and Liability Act (CERCLA). The purpose of this ESA was to evaluate the presence or possible presence of environmental contamination associated with the Property. For the purpose of this ESA, any identified presence or possible presence of environmental contamination associated with the Property will include "Recognized Environmental Conditions," which are defined in E1527-05 as:

"... the presence or likely presence of any hazardous substances or petroleum products on a property under conditions that indicate an existing release, a past release, or a material threat of a release of any hazardous substances or petroleum products into structures on the property or into the ground, ground water, or surface water of the property.... The term is not intended to include *de minimis* conditions that generally do not present a material risk of harm to public health or the environment and that generally would not be the subject of an enforcement action if brought to the attention of appropriate governmental agencies."

This report was prepared by Richard E. Doherty, P.E., L.S.P., whose qualifications are described in the resume attached in Appendix G.

1.2 SCOPE OF SERVICES

The scope of services for this ESA was based on the following tasks:

- Review the physical setting of the Property to assess potential migration through the soil or groundwater of releases identified or potentially affecting the Property.
- Conduct an environmental database search and historical records review through available state, federal and local environmental records for the Property, and to the extent reasonably accessible, those properties that lie

within a 1/2 mile radius of the Property. The following sources were reviewed:

1. *Federal.* United States Environmental Protection Agency (USEPA) Comprehensive Response Compensation and Liability Information System Listing (CERCLIS), Resource Conservation and Recovery Act (RCRA) list, National Priorities List (within 1.0 mile radius), RCRA CORRACTS facilities list (1.0 mile), RCRA Generators list and Emergency Response Notification System (ERNS) list (property only)
 2. *State.* Massachusetts Department of Environmental Protection Agency (MassDEP) Waste Site Cleanup Searchable Site list.
 3. *Local.* The Town of Carlisle Board of Health, Assessor's, Building, Conservation Commission, and Fire Department records.
- Review historic aerial photographs and Sanborn Fire Insurance Maps (if available) for the Property to better understand the history of the Property and its immediately surrounding area.
 - Perform a visual assessment of the Property for evidence of use, storage or release of oil or hazardous materials. Observations will include interior and exterior areas, locations of heating systems, utility poles and/or transformers, floor drains and the source of drinking water. Property photographs will document the assessment, particularly of any areas of potential concern which may include: storage tanks, containers of petroleum products or hazardous materials, polychlorinated biphenyls, drains, pits, ponds, stains, stressed vegetation, solid waste, wastewater and wells.
 - During the Property visit, ECR will conduct interviews with the property owner or site manager to obtain information on the Property and the immediate vicinity. Material Safety Data Sheets, if any, shall be reviewed, along with environmental audit and/or assessment reports, and permits.
 - A limited search for environmental liens on the Property will be reviewed through the Northern Middlesex Registry of Deeds.

The following items were not included in the scope of work for the ESA:

- performing a 50-year chain-of-title search;
- identifying asbestos-containing materials, radon, wetlands, or lead-based paint;
- soil, groundwater and/or air sampling.

1.3 LIMITATIONS AND EXCEPTIONS

ECR performed the site assessment described herein in a manner consistent with ASTM E 1527-05 and consistent with the level of care and skill ordinarily exercised by other environmental consultants performing similar services under similar circumstances.

This ESA is not intended to constitute an exhaustive assessment of the Property, but rather to reduce uncertainty regarding the possible presence of Recognized Environmental Conditions as defined in ASTM E1527-05. Therefore, the findings and conclusions of the ESA report do not constitute scientific certainties, but rather probabilities based upon our professional judgment concerning data reviewed during the assessment. ECR cannot represent that the Property does not contain hazardous materials or other latent environmental conditions beyond those detected or observed during performance of this ESA.

1.4 TERMS AND CONDITIONS

The report is subject to ECR's Standard Terms and Conditions which form a part of the agreement between ECR and the Client.

1.5 USER RELIANCE

This report is provided to Mr. George Dimakarakos of Stamski & McNary. Stamski & McNary is providing services related to the Property to the Town of Carlisle. Therefore, the Town of Carlisle is considered the "User" of this ESA. The report may be reviewed by financial lending institutions for the purposes of evaluating the issuance of loans on the Property to the User. Should additional information relevant to this ESA become available in the future, the findings of this ESA report should be reevaluated by ECR or another qualified environmental professional. As described in ASTM E1527-05, if more than 180 days have elapsed since completion of this ESA, the ESA will need to be updated or replaced via the performance of a new or updated ESA.

This report has been prepared for the exclusive use of the party commissioning this report under Agreement with ECR, together with the Town of Carlisle and any financial institutions acting on behalf of the Town in association with the proximate real estate transaction. No other parties are entitled to rely on the conclusions, data, or opinions contained in this report. Any such reliance by third parties without the written permission of ECR is at their own risk.

The User may show or deliver any of the site assessment work done by ECR to any person or entity provided that the User informs such person or entity in writing that such work is subject to the terms of the Contract between User and ECR, and that such work shall not be relied upon in any way. User will deliver a copy of the Contract to such person or entity at the time ECR's work is shown or delivered to such person or entity.

2.0 SITE DESCRIPTION

2.1 LOCATION AND LEGAL DESCRIPTION

The Property, located at 338 Bedford Road in Carlisle, MA, is an approximately

rectangular-shaped parcel located in a mixed residential and commercial area. The Property is shown on the aerial image on the title page of this report, and on the attached Site Plan (Figure 2). The Property is identified in the Town of Carlisle Assessor's records as Map 14, Parcel 21 (see Appendix A).

The Property previously consisted of 6.22 acres, but it our understanding that approximately 1.2 acres at the rear (south) of the Property has recently been sold to a third party. This ESA therefore is limited to the approximately 5 northernmost acres of Parcel 21. All references to the Property in this ESA are intended to refer to the remaining 5 acres of Parcel 21.

A two-story single-family dwelling is located on the southern (rear) portion of the Property. Town records indicate that the Property is currently owned by Phyllis E. Moseley.

The Universal Transverse Mercator (UTM), and Latitude and Longitude coordinates for the Property are:

UTM Coordinates

m x 307887.8
m y 4710494.5

Latitude & Longitude Coordinates

Lat 42° 31' 29.64" N
Long 71° 20' 20.04" W

2.2 PROPERTY AND VICINITY GENERAL CHARACTERISTICS

The Property is located in a rural commercial and residential area of Carlisle, Massachusetts and is zoned residential. The Property includes a 3,982 square foot 2-story residence built in 1966 and an attached garage. A long paved driveway leads gradually upward from Bedford Road to the dwelling at the southern portion of the Property. Vegetated areas (primarily lawn) abut the driveway to the east and west, as shown on the Google Earth image on the title page of this report.

The Property is located between two Town-owned properties that are shown as Protected Open Spaces on MassDEP's Numerical Ranking System (NRS) map (see Appendix C). The uses of these properties are discussed in subsequent sections of this ESA. Wetland areas are shown on the NRS map to the east and south of the Property.

2.3 CURRENT USE OF THE PROPERTY

The 338 Bedford Road Property is currently utilized as a residence.

2.4 DESCRIPTION OF SITE UTILITIES

The Property is serviced by overhead electric lines, an on-site water supply well, and an on-site septic system. The water supply well provides water for household use and an exterior sprinkler system. The residence is heated using #2 fuel oil currently stored in an aboveground storage tank housed in a wooden enclosure attached to the east side of the

dwelling. Heating oil was formerly stored in a 2,000-gallon steel underground storage tank (UST) located near the northeast building corner. As discussed in Section 5.2, this UST was removed in approximately January 1998.

2.5 CURRENT USES OF ADJOINING PROPERTIES

A commercial/agricultural property (Kimball-Bates Farm/Ice Cream Stand) is located across Bedford Road. Residential properties exist to the south and northwest. To the east and west are Town-owned properties: the Banta-Davis Playing fields and the Fox Hill conservation area, a portion of which is currently leased by the Town to agricultural users. Further west of the Property is the Green Cemetery.

3.0 USER-PROVIDED INFORMATION

3.1 TITLE RECORDS

No title records were provided by the User.

3.2 ENVIRONMENTAL LIENS OR ACTIVITY AND USE LIMITATIONS

The User was not aware of the existence of any environmental liens or activity/use limitations related to the Property.

3.3 SPECIALIZED KNOWLEDGE

The User does not have specialized knowledge or experience related to the Property. Although the Town of Carlisle owns the abutting properties to the east and west (i.e., the Banta-Davis playing fields and the Fox Hill conservation area), the User does not have specialized knowledge of the chemicals and processes that may have been used at the Property.

3.4 COMMONLY KNOWN OR REASONABLY ASCERTAINABLE INFORMATION

The User was aware that the property has been in residential use since approximately 1966, but was not aware of chemical use, spills or other chemical releases, previous environmental cleanups, or obvious indications of the presence of contamination at the Property.

3.5 VALUATION REDUCTION FOR ENVIRONMENTAL ISSUES

According to the User, the Property is not being offered at a discount to its fair market value.

3.6 OWNER, PROPERTY MANAGER AND OCCUPANT INFORMATION

Ms. Phyllis Moseley-Goff and her son, David Moseley, represented the current occupant of the Property. Ms. Moseley-Goff currently resides at the Property. A portion of the Property is rented to a tenant.

3.7 REASON FOR PERFORMING PHASE 1

The Town of Carlisle is considering purchase of the Property for use for a number of purposes, potentially including residential and recreation-related uses.

4.0 INTERVIEWS

As part of this ESA, the following persons were interviewed:

- Ms. Phyllis Moseley-Goff, owner and current occupant, on October 9, 2012
- Mr. David Moseley, son of the owner and current occupant, and former resident, on October 9 and 11, 2012
- Ms. Sylvia Willard, Carlisle Conservation Commission office, on October 9, 2012
- Ms. Melissa Stamp, Assessor, on October 9, 2012
- Ms. Elizabeth Barnett, representing the Town of Carlisle (the User), on October 11, 2012
- Ms. Marianne McInerney, Assessor's office, on October 11, 2012

Information obtained from interviews is included in this report.

5.0 RECORDS REVIEW

The following records were reviewed as part of this ESA:

An Environmental Data Resources (EDR) database search for 338 Bedford Road in Carlisle, MA was obtained. The EDR report, attached in Appendix D, contains a listing of databases reviewed and the search criteria. The EDR review also included a city directory search, attached in Appendix E. Sanborn Fire Insurance Maps were not available for the Property vicinity.

Files at the Board of Health, Building Department, Conservation Commission and Assessor's Office were reviewed at Carlisle Town Hall on October 9, 2012. Carlisle Fire Department records for the Property were obtained on October 3, 2012.

The following on-line records were reviewed as part of this Phase 1 ESA:

- Massachusetts Land Records web site (www.masslandrecords.com) on October 1, 2012

- "Searchable Sites" Reportable Release database at Massachusetts Department of Environmental Protection website (<http://public.dep.state.ma.us/SearchableSites/SearchResults.asp>) on October 2, 2012

5.1 PHYSICAL SETTING

The Property is located in a rural, mixed residential and commercial section of Carlisle. The majority of the Property consists of grassed areas that surround the dwelling and the driveway.

According to the MassDEP Bureau of Waste Site Cleanup Massachusetts Contingency Plan (MCP) NRS Map (see Appendix C), the Site is not located within 500 feet of an Interim Wellhead Protection Area, Non-Potential Drinking Water Source area, a public water supply or a potentially productive aquifer. Areas of Critical Environmental Concern were not identified within a 500-foot radius of the Site. The NRS map shows a non-community water source across Bedford Street (on or in the immediate vicinity of the Kimball-Bates Farm) with a wellhead protection area that extends onto the northern portion of the Property.

No areas of estimated habitat of rare wetlands wildlife were identified within 500 feet of the Site. Institutions, as defined in 310 CMR 40.0006, were not identified within 500 feet of the Site.

5.2 PROPERTY HISTORY

According to mortgage documents obtained from the Northern Middlesex Registry of Deeds website, the current owner of the Property is Phyllis E. Moseley. Mr. John A. Davis is listed on mortgage documents as the prior owner. Further information on site ownership was not available.

The Carlisle Building Department records indicate the two-story residence at 338 Bedford Road was built in 1966. Health Department records contained a plan dated August 1966 that indicated the location of a proposed septic system. Ms. Moseley-Goff and Mr. Moseley indicated that the dwelling was built in approximately 1966-67 and was used as a cornfield prior to that date. Mr. Moseley stated that a permit for operation of a dog kennel on the Property was granted by the Town years ago, but the kennel was never constructed.

Fire Department records included a permit dated December 17, 1997 for the removal and off-site disposal of a 2,000-gallon steel UST used to store No. 2 heating oil. The tank was transported to James G. Grant Co., Inc. of Readville, MA on January 8, 1998. Although no records were located that specifically indicated that the tanks and surrounding soils were evaluated for signs of leakage, Mr. Moseley stated that he, other members of his family, and the Town of Carlisle's Building Inspector were present at the time the tank was removed, and that no holes in the tank or other indications of spills or

leakage was observed. It is noted that the December 17, 1997 permit (see Appendix F) and application contain the notations "inspected 12/17/97" and "OK R.K. 12-17-97." In an email, dated October 9, 2012, Chief David R. Flannery of the Carlisle Fire Department verified that the initials "R.K." refer to former Fire Chief Robert J. Koning, "who was the Fire Chief at the time and also conducted the UST inspections".

Available City Directories, attached in Appendix E, included the years 2008, 1995, 1990, and 1985. The Property occupants in 2008 included Rodney A. Blake, Miles Edward Goff, and Phyllis E. Goff. The 1995 Directory indicates Sherri Coldwell and Lawrence Moseley occupied the residence. Lawrence Moseley occupied the property in 1990 and 1985. The 1985 listing also includes B.H.E. MacMellon as a resident.

Mr. Moseley and Ms. Moseley-Goff were not aware of the current presence of USTs on the Property, the past occurrence of spills or releases of hazardous chemicals, the existence of environmental liens, or the existence of prior ESAs for the Property. Records of spills, leaks, and/or potential releases at the Property were not identified in available municipal records.

Health Department records contained laboratory reports from testing of swimming pool water in 1975 for bacteria (the water was deemed "suitable") and testing of well water for volatile organic compounds (VOCs) in 2000 (no VOCs were detected). According to Mr. Moseley, VOC testing was likely requested by the provider of the water treatment system as part of the equipment selection process.

According to available MassDEP records, the Property is not subject to an Activity and Use Limitation (AUL) established under the provisions of 310 CMR 40.0000. Available property records on the MassLandRecords website did not indicate the presence of environmental liens on the Property.

5.3 VICINITY HISTORY

City Directories for years 1985, 1990, 1995 and 2008 indicate the residential property located at 326 Bedford Road was occupied by Timothy Landers. The Kimball Farm property located across Bedford Road (#341 and #343) was owned and/or occupied by Richard Bates in 1985. The 1990 City Directory indicates Dana and Richard Bates are the owners/occupants. Both the 1995 and 2008 City Directories indicate the owner/occupant at 341 Bedford Road is Michael Kimball. The 343 Bedford Road property states the owners/occupants for those years are Paula Michaud and Kimball Farm, Inc.

The Kimball-Bates Farm property has been used as an ice cream stand since at least the 1970s. According to the Kimball Farm history page (www.kimballfarm.com), the Bates family owned and operated the property for 25 years as a dairy farm. The Kimball family leased and eventually purchased the Bates farm in 1989 to serve as an ice cream stand.

The property to the east is conservation land owned by the Town of Carlisle. According to the July 2006 Land Stewardship Committee "Fox Hill Management Plan", the town purchased the 11.22 acre farm land in 1981. The Banta-Davis playing fields are located at 300 Bedford Road to the west of the Property, and are owned by the Town of Carlisle. According to the Carlisle Recreation Department website, the fields include a Little League baseball field, a softball field, a soccer field surrounded by an asphalt running track, and a fitness course. According to the Carlisle Trails committee website (www.carlisletrails.pbworks.com), the 40 acre Banta-Davis land was formerly owned by the Green family since the 1700s. Mr. Moseley stated that the current Banta-Davis playing field property was previously used for growing asparagus. Beyond this is the Green cemetery, also formerly owned by the Green family.

The EDR report (see Appendix D) lists sites in the vicinity where releases of oil and/or hazardous materials have occurred. ECR reviewed the list of nearby sites, and, in ECR's opinion, none of the reported sites constitutes a threat to environmental conditions at the Property.

6.0 SITE RECONNAISSANCE

6.1 METHODOLOGY AND LIMITING CONDITIONS

Mr. Richard Doherty and Ms. Lisa Raye of ECR visited the Property on October 9, 2012. Mr. David Moseley accompanied ECR for the site reconnaissance. A portion of the basement is currently leased to a tenant and could not be viewed. According to Mr. Moseley, the current southern Property line (i.e., the Property line after the recent sale of 1.2 acres that previously formed part of the Property) coincided with the edge of the lawn and the beginning of a wooded area. Therefore, the wooded area south of the lawn was not included in the site reconnaissance.

Viewing of the heating oil aboveground storage tank (AST) housed in a wooden enclosure attached to the east side of the dwelling was limited by the existence of the enclosure. The AST could only be viewed through a small access port as described further below.

6.2 GENERAL SITE SETTING

The Property includes a 3,982 square foot 2-story residence built in 1966, and an attached garage. A long paved driveway leads gradually upward from Bedford Road to the dwelling at the southern portion of the Property. Vegetated areas (primarily lawn) abut the driveway to the left and right, as shown on the Google Earth image on the title page of this report.

6.3 PROPERTY EXTERIOR

The Property exterior is comprised primarily of grassed areas. Wooded areas exist

along the stone walls that form the eastern and western Property lines. Landscaped areas exist just outside the dwelling. A circular area comprised of sandy soil with essentially no vegetation exists just southwest of the dwelling. According to Mr. Moseley, this was the former location of an aboveground swimming pool.

A paved driveway runs from Bedford Street to the dwelling. According to Mr. Moseley, the driveway was unpaved prior to 2004. Mr. Moseley stated that, years ago, oil had been applied to the driveway on several occasions (an estimated three times) to suppress dust.

A heating oil AST is housed in a wooden enclosure attached to the eastern portion of the dwelling. The AST was only partially visible through a small access port. ECR did not observe evidence of leakage via the access port; however, access to the tank was limited.

A 16' x 24' wooden barn, built in 1966, is located northwest of the dwelling. The barn has an earthen floor currently covered by sheets of plywood. A hole in the northern corner of the barn was reportedly caused by a burrowing animal. The barn is currently used for storage of a lawn mower, mower attachments, and various miscellaneous items. Storage of significant quantities of oil or hazardous materials was not noted. Mr. Moseley stated that the barn was originally used to house horses, and was later used for automobile storage. Mr. Moseley stated that the barn was not used for automobile maintenance or repair. He stated that two automobiles were stored outside the garage for a period of time.

A small 12' x 16' shed is located east of the dwelling. Small quantities of household chemicals (e.g., paints), tools, and miscellaneous items including a swimming pool pump were neatly stored in the shed.

A drain is located in the paved area just outside of the garage. Mr. Moseley stated that the drain feeds a dry well located on the Property south of the driveway. Evidence of spills or staining was not noted in the vicinity of the drain. A smaller drain is located outside the door leading to the rental unit. This door is located on the southern portion of the building. The drain appeared to be clogged and non-functional. The discharge point of the drain is unknown.

A pole-mounted transformer was noted on a utility pole on the Property (see Figure 2). Mr. Moseley stated that the transformer had been replaced at least once in the past. Based on the likely age of the transformer, it is unlikely to contain polychlorinated biphenyls (PCBs).

Areas of stressed vegetation were not noted during the site visit. Evidence of spills of oil or hazardous materials was not noted.

- **Recognized Environmental Conditions were not identified during the ESA.**

The conclusions expressed herein are subject to the Limitations and Exceptions noted in Section 1.3 of this report, and the Terms and Conditions referenced in the agreement between ECR and Mr. George Dimakarakos of Stamski & McNary, Inc.

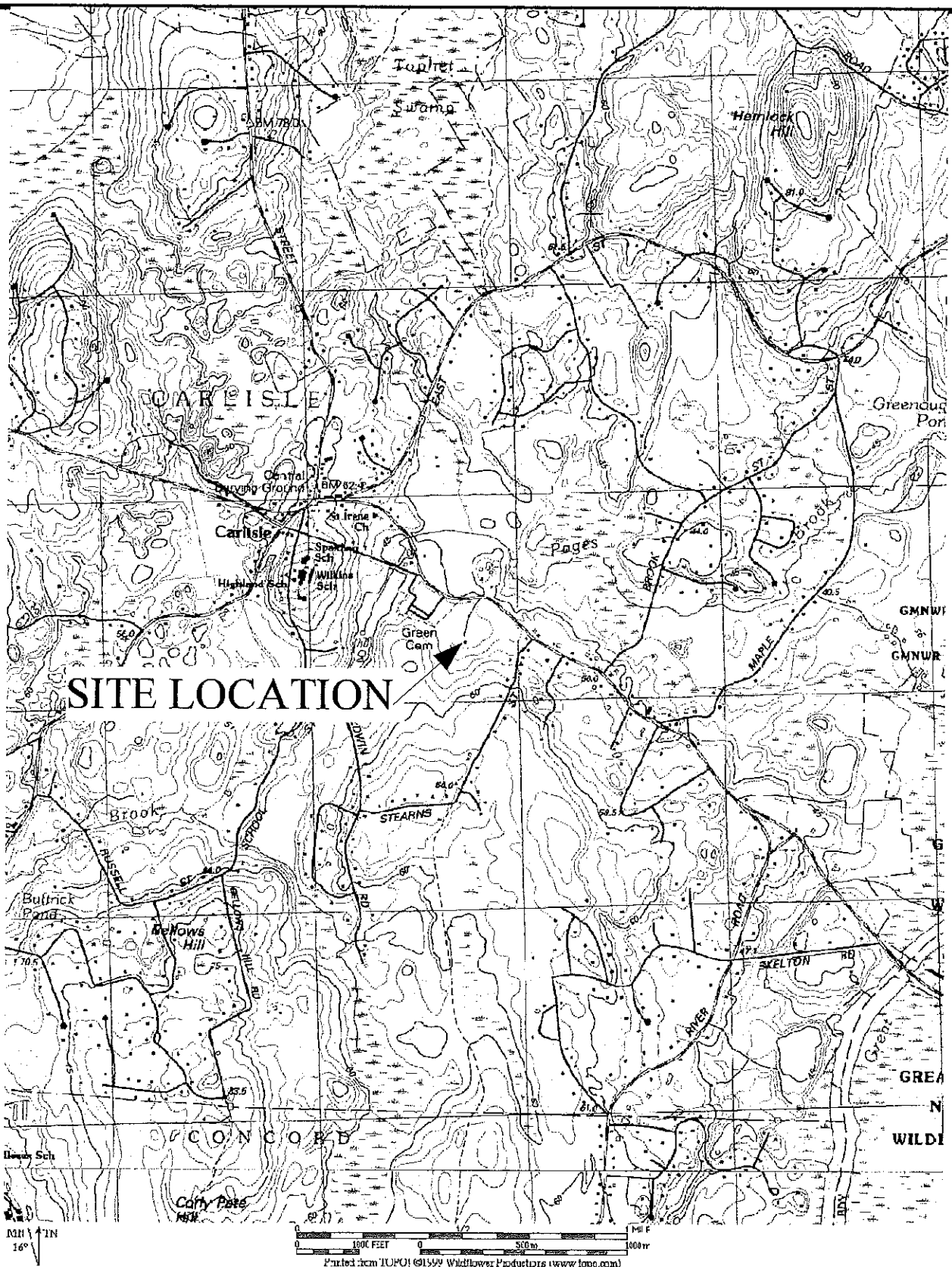
8.0 DEVIATIONS

Deviations from the ASTM Standard (E1527-05) in performing this Phase 1 ESA include the following:

- A 50-year chain-of-title search was not performed.
- The potential presence of radon or asbestos was not assessed.

FIGURES

]



SOURCE:
United States Geological Survey quadrangle map for
Billerica, Massachusetts, dated 1987

TITLE:

SITE LOCUS

Engineering &
Consulting
Resources, Inc.
www.ecr-consulting.com

FIGURE #:

1

ADDRESS: 338 Bedford Road
CARLISLE, MASSACHUSETTS

DATE:
10/8/12

SCALE:
See SCALE

FILE:
1175SL

APPENDIX I

338 Bedford Road Master Plan Report, 2014

338 BEDFORD ROAD-CARLISLE, MA
MASTER PLAN FINAL REPORT
APRIL 11, 2014



ABACUS [ARCHITECTS + PLANNERS] 119 Braintree Street Boston MA 02134 tel 617 562 4446 fax 617 254 0004

RYAN ASSOCIATES Landscape Architecture and Planning

SAMIOTES CONSULTANTS, INC. Civil Engineers

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SECTION 1-MASTER PLAN OVERVIEW

The Town of Carlisle, at a November, 2012 Special Town Meeting and subsequent Special Town Election, authorized the Carlisle Affordable Housing Trust to purchase a five acre parcel of land located at 338 Bedford Road. The Trust closed the acquisition of the Property in May, 2013. The purchase was intended to be used for development of facilities that meets Town needs. The seller put a 10 bedroom limit on group home residential development on the property and also allowed a community or recreational center, recreation fields, and certain other supportive uses.

The primary need that has been established is for two single level accessible group homes for developmentally disabled adults. Each building is to have four or five bedrooms (nine or ten total), living spaces, kitchen, office, support facilities, and associated access, parking for vans, employees and visitors, and usable outdoor space. The development will also need to include a well, an on-site Title V septic system, and fire protection as required by regulatory authorities. The development of these homes will allow developmentally disabled adults to remain in the community, while allowing the Town to add nine or ten units to Subsidized Housing Inventory and parking as defined by Chapter 40B regulations.

The housing is to be sited to allow other potential future uses on the property. Uses considered by the Trust include:

- A multi-generational community center to meet

the needs of a growing senior population and/or the need for recreation and meeting space for residents of all ages. Current facilities, such as Town Hall, are often overbooked, and additional space appears to be needed. The facility will need to include provisions for water, sewage and fire protection along with parking and access.

- Outdoor recreational facilities such as a swimming pool, tennis courts, basketball court, Little League field and seasonal skating rink.
- A secondary access road from 338 Bedford Road could also provide access to the adjacent 39 acre property owned by Banta-Davis. Of those 39 acres, 6.5 are currently used for recreational playing fields and studies have been done to build an affordable housing rental development on that site as well. This secondary access road would primarily serve the group homes, but could also serve as a secondary or emergency access road to Banta-Davis.
- Carlisle does not have a municipal water or sewage system. 338 Bedford Road could provide a location for facilities that serve the site and the future development on the Banta-Davis site. These include an additional leaching field for the Town-owned waste water treatment facility located on the Banta Davis property, and a fire cistern. On the other hand, a large community facility at 33 Bedford Road would have to draw its water from a well on Banta-Davis as there is insufficient area at 338 Bedford Road to locate a public drinking well.
- One or more utility corridors from Bedford Road through the 338 Bedford Road property that could

SECTION 2-MASTER PLAN GOALS

serve uses on site or on the Banta Davis site.

- Trails from the adjacent Town owned Fox Hill Conservation property through the 338 Bedford Road property to the Banta Davis property to form a continuous walking path.

In July of 2013 a Request for Qualifications was issued to qualified design teams for the preparation of a Master Plan for the property. Qualifications were reviewed and teams interviewed.

Abacus Architects + Planners (David Eisen and David Pollak - Principals, with Ryan Associates Landscape Architects (Tom Ryan - Principal) and Samiotes Consultants Civil Engineers (Steve Garvin - Principal) were hired by the Affordable Housing Trust to prepare the 338 Bedford Road Master Plan. Working with Elizabeth DeMille Barnett, the Town's Housing Coordinator, Greg Peterson, Chairman of the Affordable Housing Trust, and members of the Trust and Board of Selectmen, the Abacus Team developed a public process to gather information from residents on Town needs, development preferences, and resident concerns. Based on this input plan options were to be developed, evaluated by Town boards and the public, and then revised to suggest alternatives directions around which a consensus could develop. The Affordable Housing Trust has the authority to make a final decision on the final master plan direction.

Although it was anticipated that 338 Bedford Road could accommodate a range of Carlisle needs, the group homes are the only use that has been approved

for development. A primary objective of this master plan is to provide a location for the homes that is optimal for these residential uses, while allowing future development that is accessible to Town residents while respecting the privacy of group home residents. It is anticipated that a Request for Proposals for the development of these homes will be issued for responses from qualified developers and service providers. The final Master Plan is to include design standards for the group home construction and site development that would be included in the RFP.

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE I

The public process developed by the Affordable Housing Trust, Housing Coordinator, and the Design Team proceeded as follows.

Design Charrette I – September 16, 2013

Members of Town boards, local design professionals, and other interested parties were invited to participate in a hands-on design process to establish basic approaches to the master planning of the site. The evening was organized to raise questions and develop possibilities for development. Significant steps included:

- The Design Team led a walk around the 338 Bedford Road property and to the adjacent Fox Hill and Banta-Davis properties to acquaint participants with site features, property line definition, and relationship to adjacent properties and Bedford Road. Wetlands, topography, and the adjacent Landers residence along Bedford Road were noted.
- The Design Team introduced development options and then divided participants into two groups of approximately eight people each. Participants discussed and filled out adjacency matrixes that asked them to consider positive and negative relationships between possible program elements to facilitate an understanding of potential spatial relationships between them.
- Large scale aerial photos at 1" = 40' of the 338 Bedford Road property and its surroundings, and



Above - Aerial view of 338 Bedford Road and adjacent Banta-Davis playing fields.

Below - View from existing house towards Bedford Road.

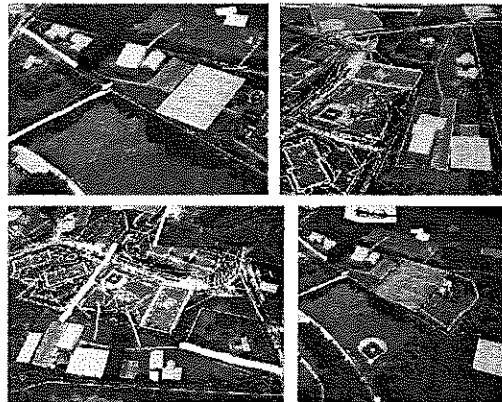
338 BEDFORD ROAD MASTER PLAN REPORT

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE I

alternatives for the abutting portions of the Banta-Davis property, were set up on tables for the two groups to use as a basis for their work. Each group was provide with an assortment of playing field and parking lot plans, group home and community center conceptual foam block models, rolls of tape representing drives of varying widths, and green foam representing landscaped areas. They were requested to lay out a variety of options in three dimensions on the aerial photos to represent master plan options.

- Design Team members discussed options with participants and recorded their master plan options in photographs.

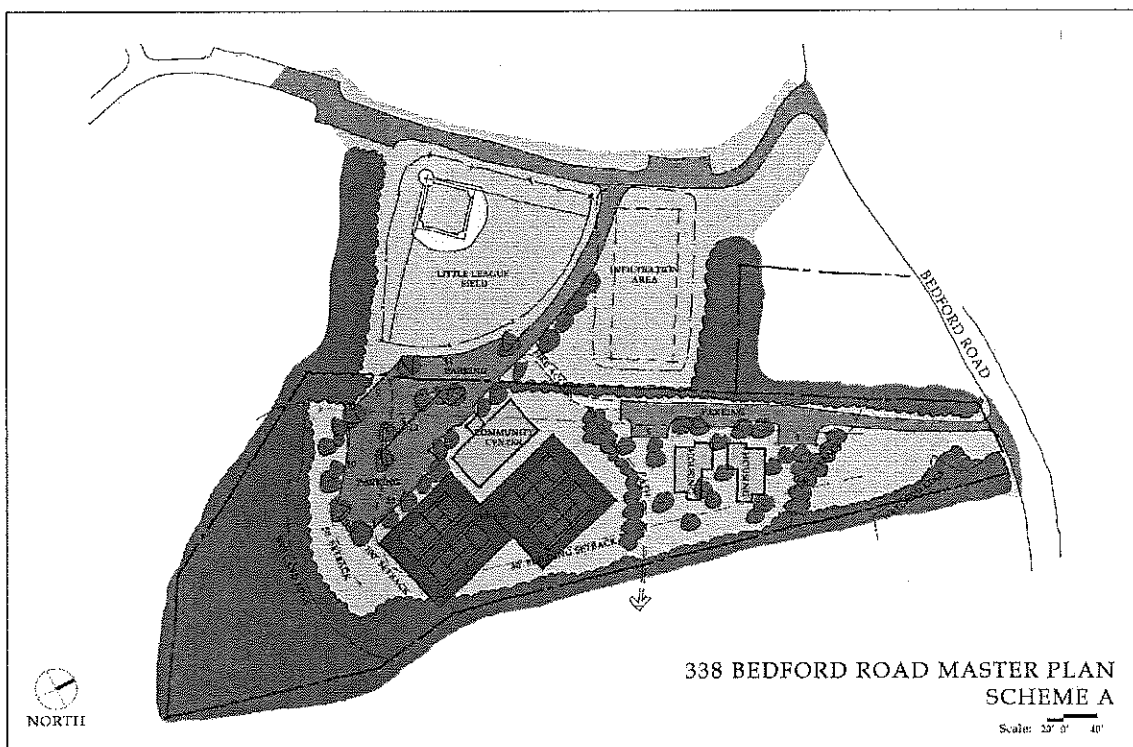
Based on the master plan ideas developed at the charrette, the design team developed a series of plan options representing the variety of ideas suggested. Options included group homes towards the front of the site, group homes towards the rear of the site, playing fields in varying number and configuration, access road and drives with different configurations, and community centers with different sizes and locations. Different relationships between the 338 Bedford Road property and adjacent Fox Hill and Banta-Davis properties were developed.



Above - Design charrette in process

Below - Images of design charrette layouts

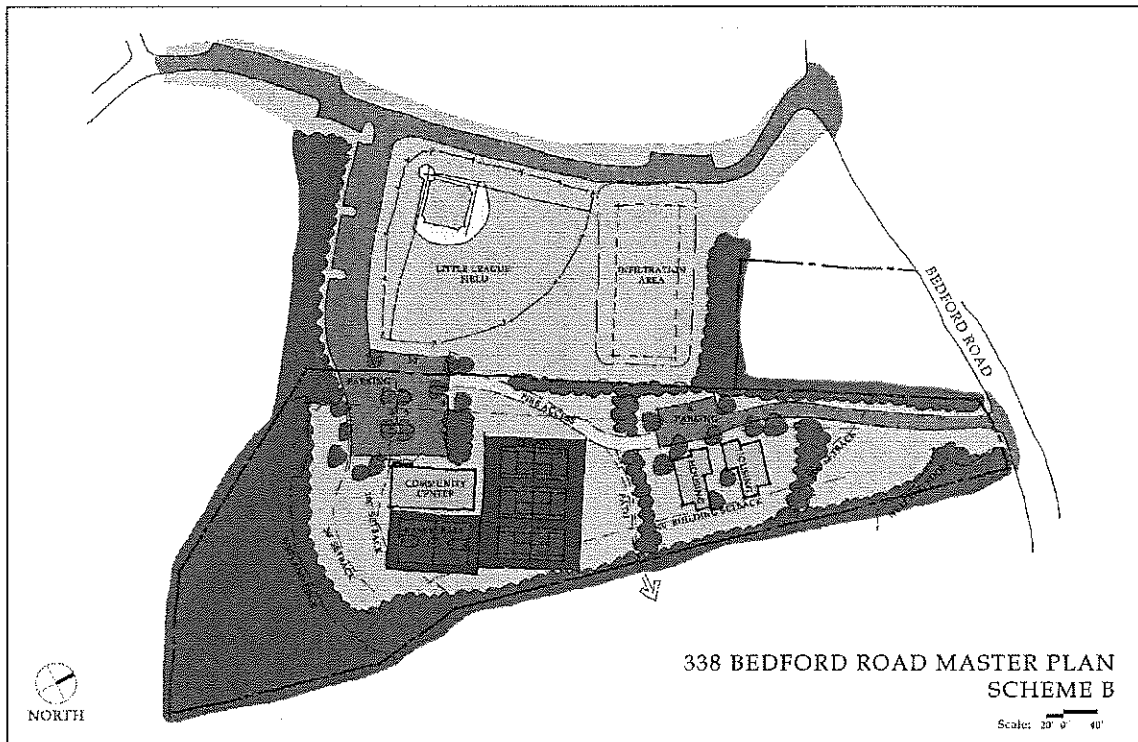
SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE I OPTION A



Housing in front allows development of recreational facilities in the rear with parking serving 338 Bedford Road and Banta-Davis playing fields. A drive connects the two properties between the baseball field and the infiltration area.

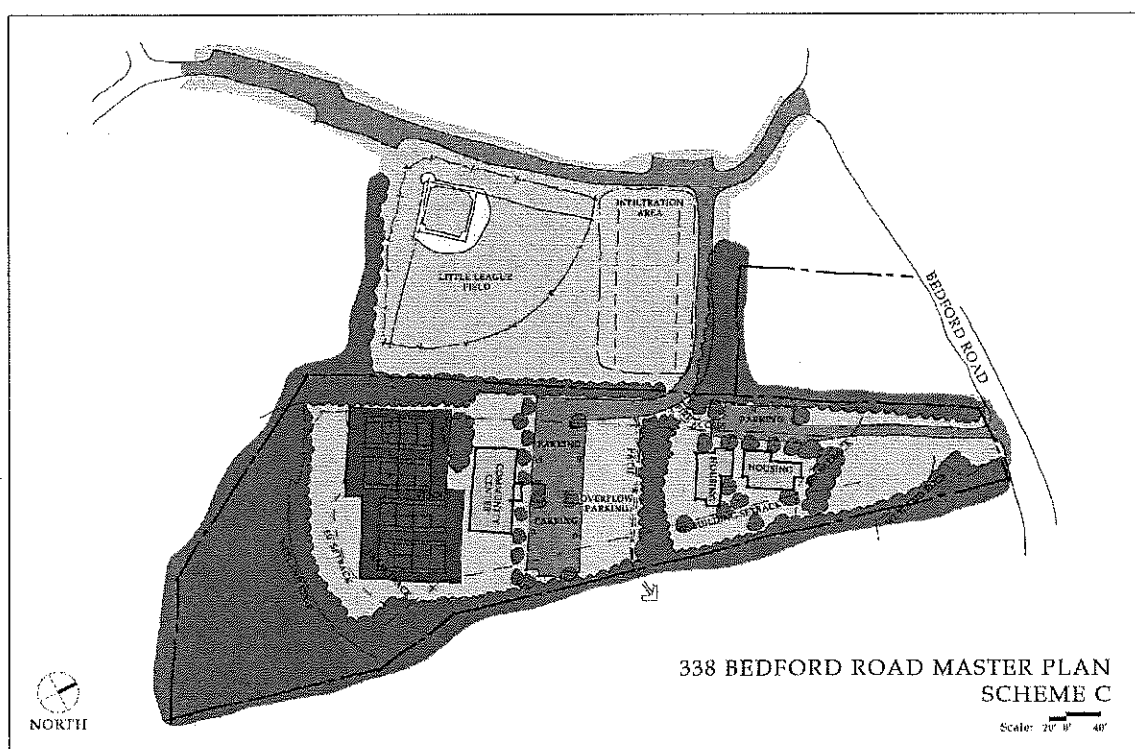
338 BEDFORD ROAD MASTER PLAN REPORT

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE 1 OPTIONS B



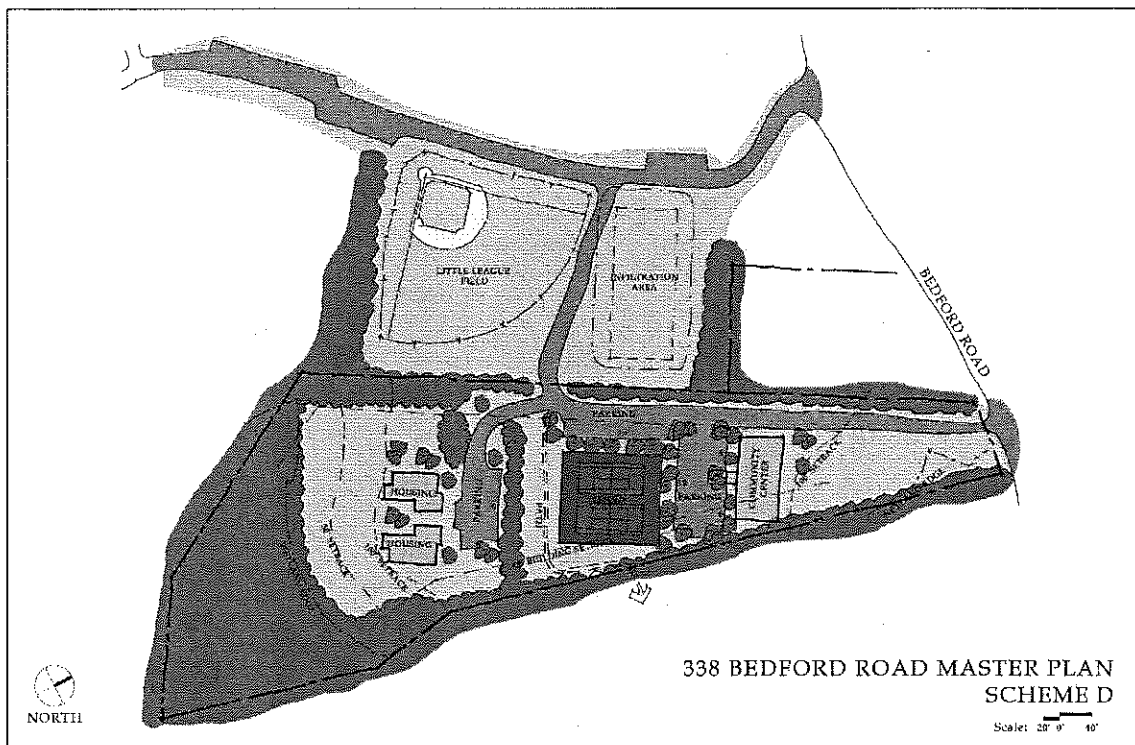
Parking is broken into smaller lots with much of it located between the Banta-Davis baseball field and the adjacent wooded area along a connecting drive.

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE I OPTION C



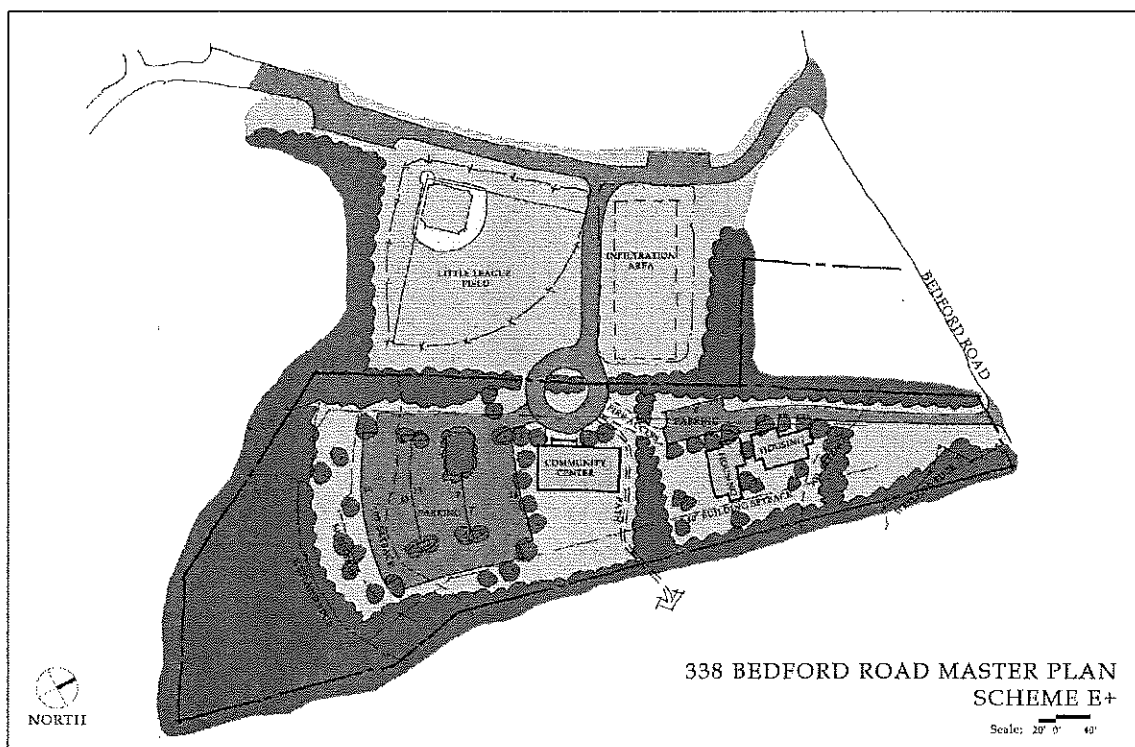
Parking provides a buffer between recreational facilities in the rear and housing in front with a connecting driveway on the north side of Banta-Davis.

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE | OPTION D



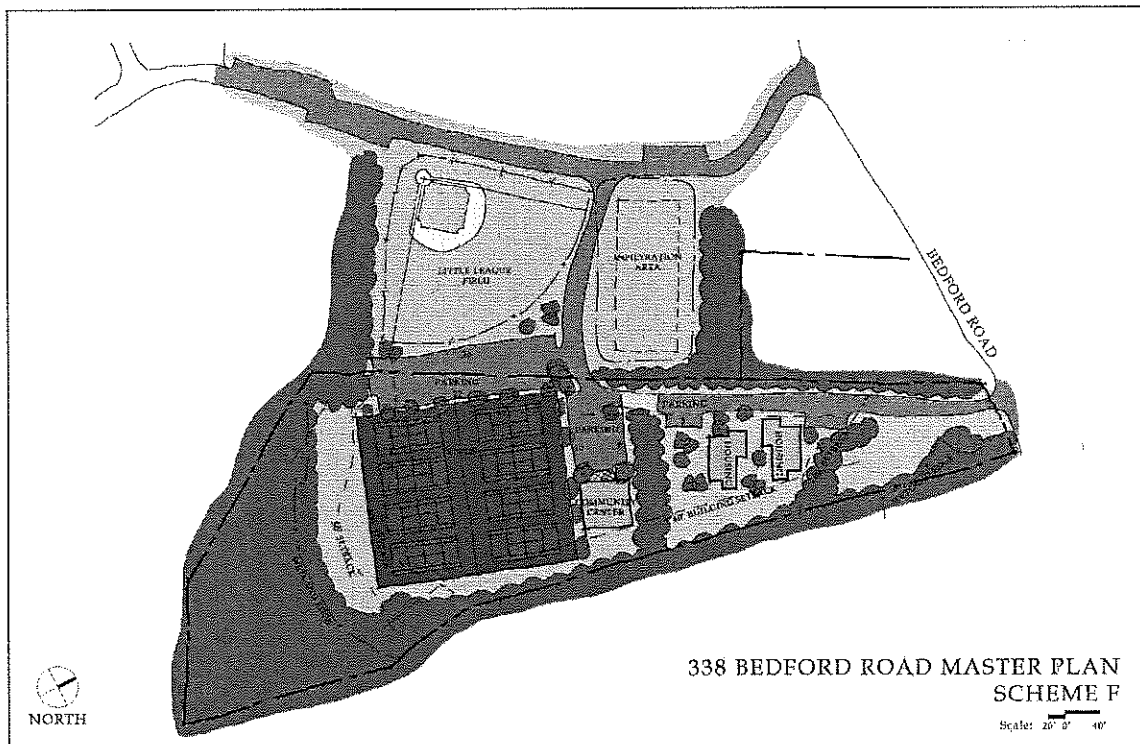
Housing at the rear of the property has generous open space. A community center and recreational facilities at the front are accessed from the Banta-Davis property and Bedford Road. Parking is accommodated in several small lots.

SECTION 3-MASTER PLAN PROCESS
DESIGN CHARRETTE I OPTION E



The site could provide additional parking for Banta-Davis activities along with parking for a community center or other uses on 338 Bedford Road. Parking would be accessed from the Banta-Davis property.

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE 1 OPTION F



With housing at the front of the site the rear could accommodate a variety of recreational uses that augment those on other Carlisle properties. Parking could serve both 339 Bedford Road and the Banta-Davis property and help tie them together as a single recreation area.

SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE II

Design Charrette II -- October 14, 2013

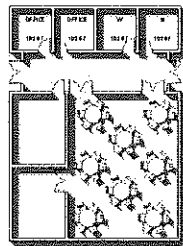
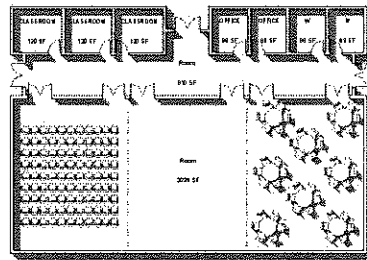
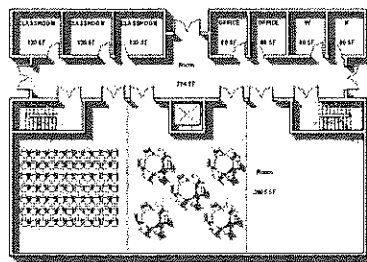
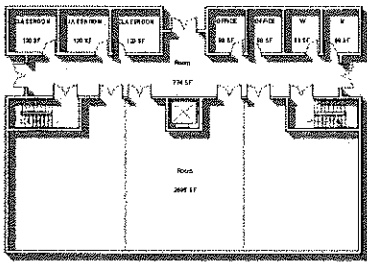
Master Plan Conceptual Options developed from Charrette I layouts were presented to the participants along with a recap of the issues discussed. Possible planning options and models for group homes, and conceptual layouts for 2,500, 5,000 and 10,000 square foot community centers were presented to suggest the scale of the development being considered. The Design Team distributed a series of questions that were intended to form the basis for discussions and further design work. Options were discussed in a spirited exchange of ideas. Participants contributed the following thoughts:

- David Klein of the Council on Aging highly recommended a 10,000 square foot senior center/ community center to accommodate the needs of an aging population and residents of all ages.
- Parking for the community center could also serve adjacent playing fields on the 338 Bedford Road and Banta-Davis properties.
- Other participants believed that a 10,000 facility was too large and would require too much parking.
- A road connecting 338 Bedford Road with Banta-Davis should not be located where it might be dangerous for children using playing fields.
- Although playing fields could be included on the 338 Bedford Road site, this did not appear to be a high priority for participants.
- A limited number of basketball or tennis courts that could also be used as a seasonal skating rink,

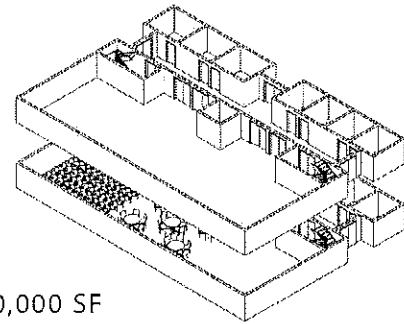
received significant support.

- Participants tended to favor siting the group homes towards the front of the site where they would connect to the neighborhood fabric and where they could be easily accessed from Bedford Road, leaving the wide rear of the site for development of community and/or recreational facilities. These facilities would be accessed from the Banta-Davis property with a fire lane closed to the public connecting to the group home access driveway.
- A minority believed that the group homes should be at the rear of the site where they might have more privacy. They proposed that this option should be kept open for consideration.
- Participants felt that the group homes should offer residents privacy while connecting them to the broader community.

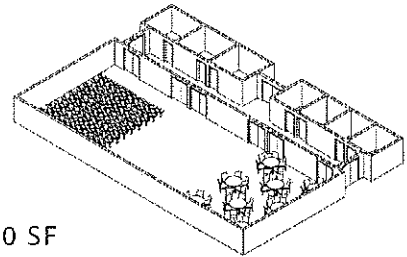
SECTION 3-MASTER PLAN PROCESS DESIGN CHARRETTE II COMMUNITY CENTER OPTIONS



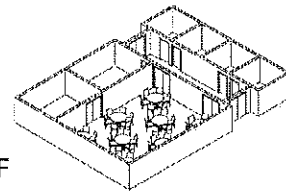
338 Bedford Road could accommodate a community center between 2,500 and 10,000 square feet depending on how the site is utilized. The Town should evaluate its needs and how to accommodate them on a comprehensive level and review the appropriateness of this site for community center uses. These diagrams illustrate the program at a variety of sizes and were presented to the charrette members for reference.



10,000 SF

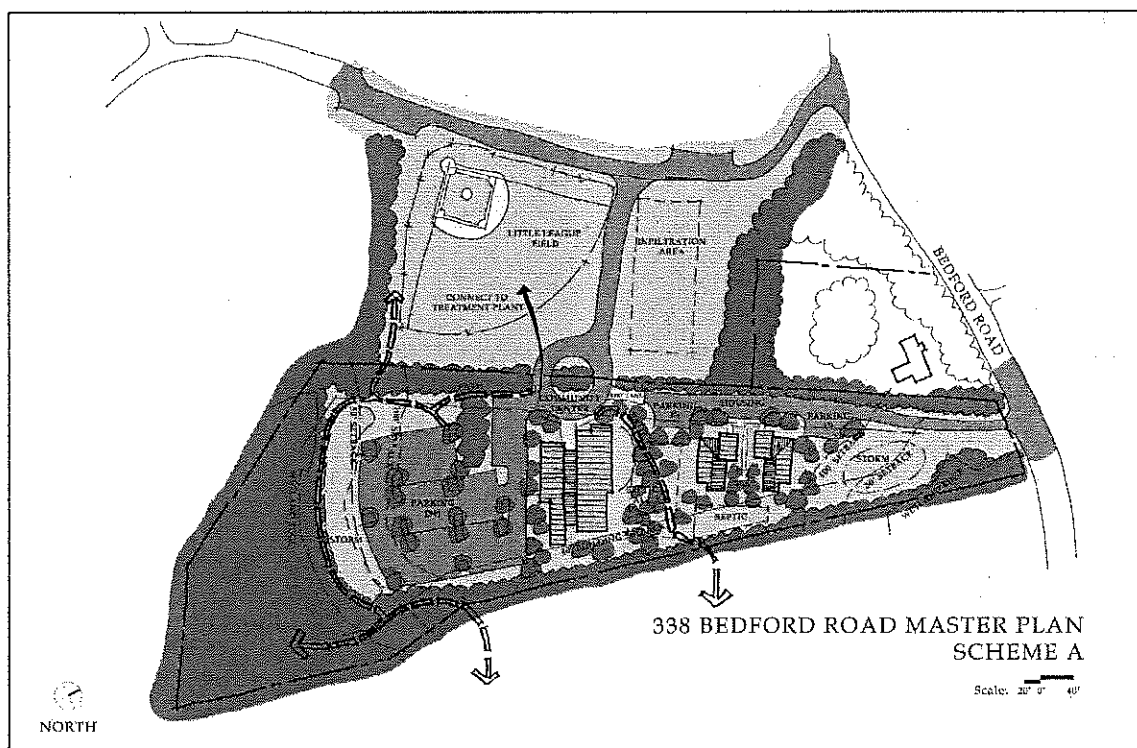


5,000 SF



2,500 SF

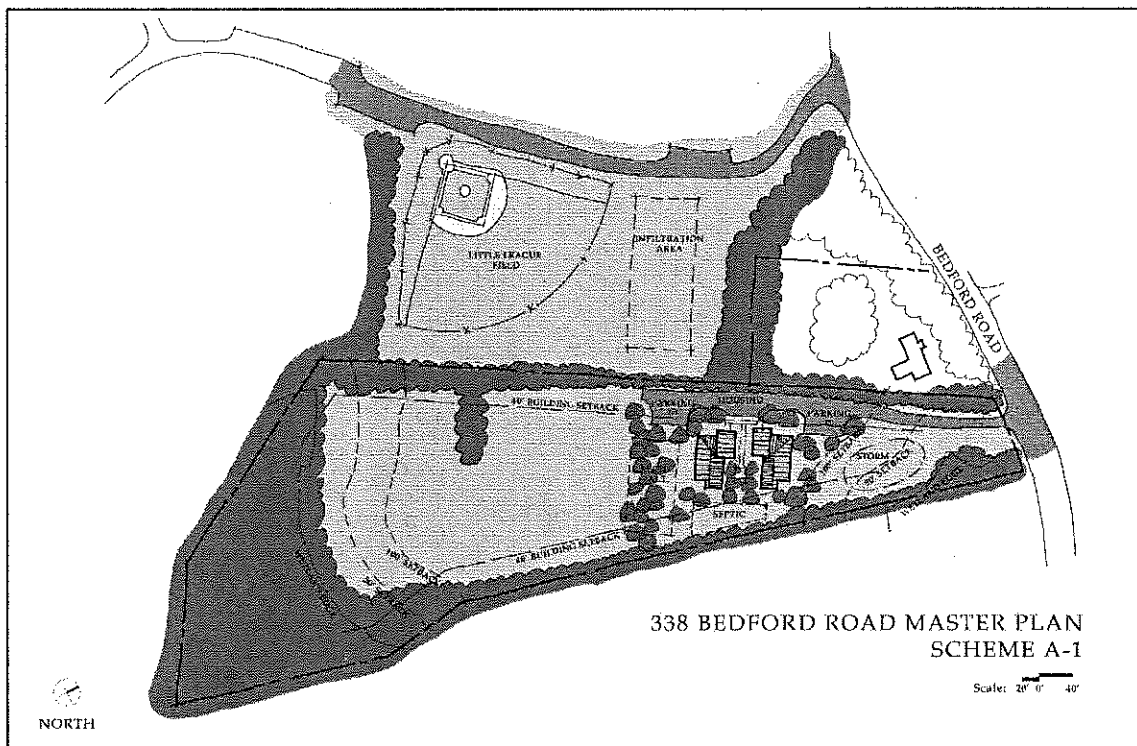
SECTION 3-MASTER PLAN PROCESS REVISED DESIGN OPTION A



A ~10,000 square foot community center and associated parking occupies the wider back half of the site with housing facing Bedford Road. The parking can be shared with Banta-Davis recreational facilities. Walking paths offer a variety of connections to adjacent properties.

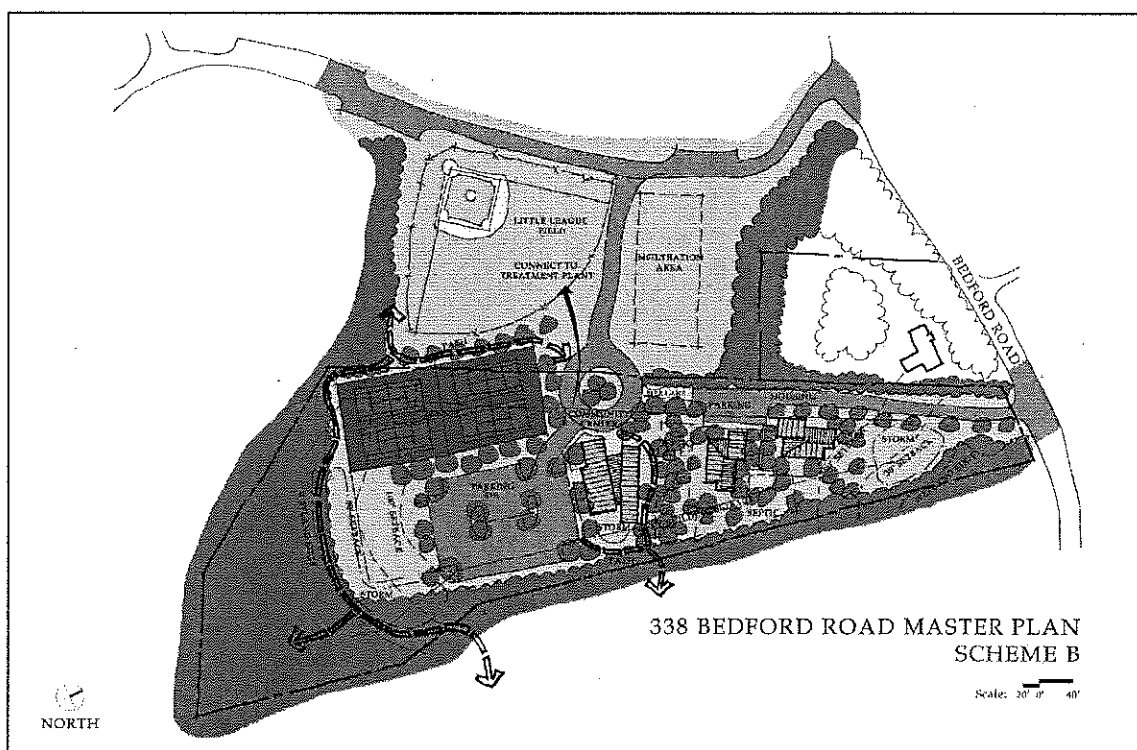
338 BEDFORD ROAD MASTER PLAN REPORT

SECTION 3-MASTER PLAN PROCESS REVISED DESIGN OPTION A-1



Housing can be built first allowing recreational and other uses to follow as the Town evaluates its priorities and how to meet them.

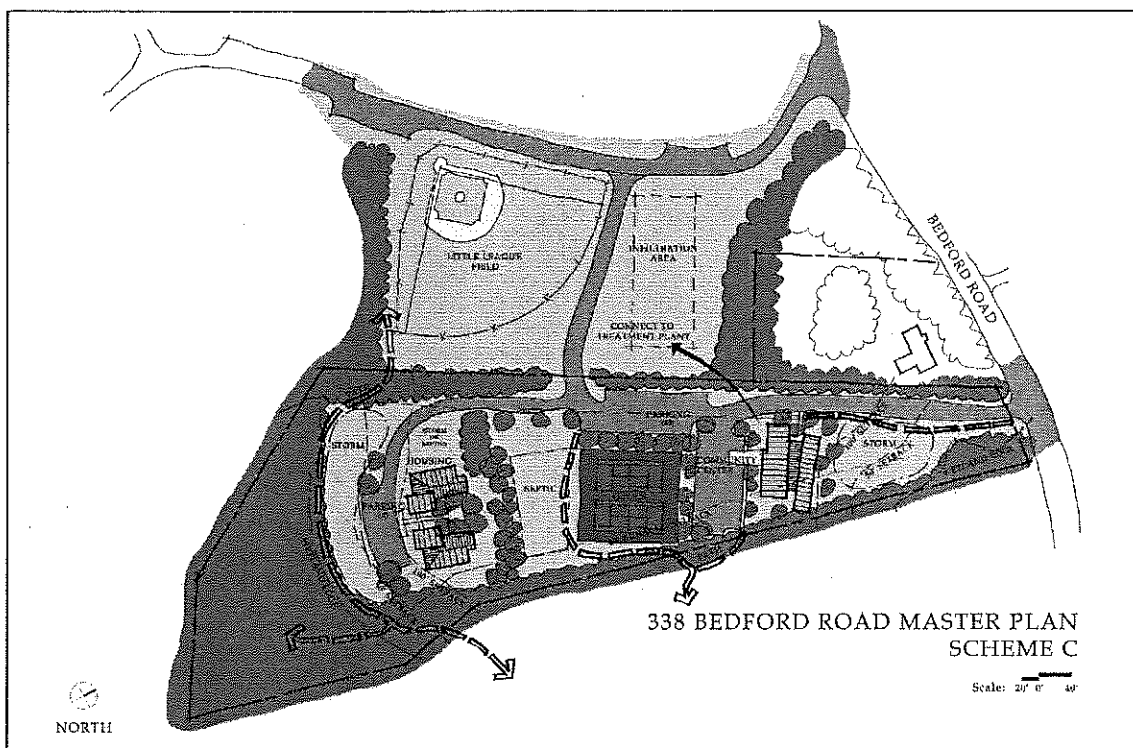
SECTION 3-MASTER PLAN PROCESS REVISED DESIGN OPTION B



A smaller community center footprint would allow other recreational uses to be accommodated. They could connect the 338 Bedford Road property with the Banta-Davis property and its current or new recreational facilities. Parking could serve uses on both sites and help connect them together.

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SECTION 3-MASTER PLAN PROCESS REVISED DESIGN OPTION C



Housing located at the rear of the site allows recreational uses to occupy the center with a small community near Bedford Road. Parking is limited but could serve both sites. Housing would be isolated behind public uses and far from the main access road.

SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

Responses to the Conceptual Master Plans were noted and plans reconfigured and consolidated to represent two primary options: housing in the front with community facilities at the back of the site, and housing at the back of the site with community facilities at the front. Relationships to the Fox Hill and Banta-Davis properties were refined, along with parking and roadways. A 5,000 square foot and a 10,000 square foot senior/community center were illustrated.

These plans were presented to four Town Boards for review and discussion. Below are comments from Board members and members of the public present:

Board of Health - December 3, 2013

Attending: Tom Ryan, Stephen Garvin Elizabeth DeMille Barnett, Greg Peterson, Board Members, the public.

- The creation of walking paths, especially accessible paths, connected to walking paths on adjacent properties, was encouraged.
- Reserving a leaching field expansion area on the site as a continuation of the existing field on Banta Davis, was favored. This would mean leaving significant space between the Community Center and the Housing. Parking or recreation facilities could be constructed over a leaching field.
- Preference for connecting to the treatment plant (at least initially) to feed the system and improve its function. The residential use would provide a more consistent flow and improve treatment efficiency.

Housing sewage treatment system could be changed if the remainder of the site is developed.

- Well locations should be indicated on the site master plan.
- The Master Plan should include a DEP ruling on the feasibility of installing an independent septic system on the 338 Bedford Road site.
- Some of those attending were not supportive of a 10,000 square foot community center and 100 car parking lot on this site.

Conservation Commission - December 5, 2013

Attending: Tom Ryan, Stephen Garvin, Elizabeth DeMille Barnett. Commission Members and the public.

- The creation of walking paths, especially accessible paths, connected to walking paths on adjacent properties, was encouraged.
- Maximizing solar orientation of all buildings was encouraged.
- It was suggested that a 10,000 sf community center with parking lot and outdoor recreational facilities were too much development on the site in addition to the group homes.
- Well locations, septic fields and storm water infrastructure should be indicated on the master plans.
- It was suggested that the fire department might require 24' of pavement width and flat areas for equipment deployment for the housing driveway.
- The Commission indicated that it would not oppose locating group homes closer to Fox Hill than the ordinary 40 foot zoning setback.

SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

Planning Board - December 9, 2013

Attending: David Pollak, Tom Ryan, Elizabeth DeMille Barnett, Board Members and the public

Elizabeth DeMille Barnett provided the Board with an overview of the project history and the context in relation to Carlisle's Supportive Housing Inventory and Chapter 40B. Tom Ryan presented an overview of the work to date by the design team and town participants through the two evening work sessions (charrettes) as well as the presentations to the Board of Health and Conservation Commission. Board Chair Marc Lamere led off with some questions and comments. He spoke favorably toward:

- Locating the smaller scale group homes at the front of the site and larger scale community facilities at the larger back portion of the site.
- Providing a separate entrance driveway for the housing
- Connecting the community building and community facilities to Banta Davis access and facilities.
- Screening views of parking with buildings, landscaping and other means.
- Providing recreational/trail access to Fox Hill.

Mr. Lamere also wanted to make sure the following concerns were being addressed:

- Well location and clearances, public versus private well
- Leaching field issues requirements and locations
- Paving and storm water management including run-off location and treatment
- Fire department access issues including review by the fire department. There was some discussion of common versus private driveway regulations in relation to fire department requirements.
- Fire cistern questions including review by the fire department. It was noted that there is a fire pond on Church Street near Bedford Road.
- Connections with Fox Hill walking trails and open space.

Nathan Brown, a Board member who had participated in the charrettes spoke in favor of the housing up front. He agreed that the fire department should be consulted, and raised the question of whether the Banta Davis road connection might need to be included in the first phase of development in order to provide fire truck access and egress.

Jonathan Stevens expressed concern about the driveways and traffic in relation to child safety around the ball field(s).

SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

Planning Board - December 9, 2013 (Continued)

Ed Rolfe asked about recreational opportunities and site development at the group homes, noting that the residents of a group home near where he lives play basketball outside their house.

Michael Epstein favors the housing up front and maximizing the usability of the remaining land by efficient planning of the group home portion of the site. He noted that there is a lot of protected open space in Carlisle and that this parcel should be planned to meet the needs of the town. For now that means maximum flexibility. He also suggested that the community uses are better toward the back where they are further from the private home on the adjacent Landers property.

Mr. Epstein suggested that it would be preferable to locate the group homes closer to the Fox Hill property, possibly situating them in the side yard setback if this is acceptable to the Conservation Commission, in order to keep the remaining parcel as open as possible. Mr. Epstein expressed concern that a turnaround drop-off driveway at the community center was 'doing the easy thing' and that it takes up a lot of land. Mr. Epstein suggested that it would be helpful to present a site plan that just shows the 'Phase 1' development associated with the group homes. There was general agreement to this idea and the consultants agreed to provide this drawing.

David Klein, Director of the Council on Aging spoke in favor of lots of walking paths and also of accessible paths.

Board of Selectmen - December 10, 2013

Attending: Tom Ryan, David Eisen, Elizabeth DeMille Barnett, Greg Peterson, Board Members, the public

Elizabeth presented history and goals of the master plan project and proposed housing. David and Tom presented housing plans, photo design references and Site Plan options. It was noted that ultimately the critical decisions for this master plan are about housing location and design guidelines. Other issues will be pursued in the future in relation to Banta Davis and other Town concerns.

- General support was expressed for housing at the front of the site rather than at the rear because it maximizes opportunities for future development and flexibility of use.
- Concern was expressed about maintaining view corridor on Bedford Road; David and Tom suggested that housing would be low and set back relatively far from the road and would not impinge on views and rural character. Other facilities would be set back even farther.
- Concern was expressed about 10,000 sf community/senior center and 100 cars. COA Director David Klein articulated the need for this size facility and two other residents spoke in favor of this size facility. It was noted that there may be other sites or other ways to meet community center and senior center needs and that the Town should investigate these before making decisions on the non-housing components of the 338 Master Plan.

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SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

- In response to Selectmen questions Tom noted that it would be simpler to develop the housing if it had its own independent septic system rather than connecting to the system on the adjacent Banta-Davis site. Samiotes will continue to investigate septic and water supply options.
- A resident expressed concern about the lack of formal crosswalks at 338 Bedford Road driveway. David Eisen noted that the planning team anticipates that all public facilities on the 338 Bedford Road site will be accessed from the Banta Davis site and entry drive. The housing site and drive should be designed as if it were a separate private property connected to the public facilities by a closed-to-the-public fire lane in conformance with Fire Department requirements.

Fire Department- January 9, 2014

Attending: Chief David Flannery, Deputy Chief Jonathan White, Rob Dennison, Tom Ryan, David Eisen, Elizabeth DeMille Barnett

Abacus and Ryan reviewed the proposed housing and possible community center. The fire department stated that they would like to have:

- A fire pond or 30,000 gallon fire cistern
- 18' wide drive with a 46' inside diameter turn around.
- Buildings 30' from significant stands of trees
- No mulch against buildings
- A fire alarm system

Elizabeth noted subsequently that in initial discussions with the Building Department she had learned that a 10 bedroom development with two buildings would have the same regulatory requirements as a single family house, and from that standpoint would not require an 18' drive or fire cistern/pond, and that a private drive rather than a common drive would be needed.

SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

Public Presentation - January 25, 2013

Attending: David Pollak, David Eisen, Elizabeth DeMille Barnett, Greg Peterson, the public.

Elizabeth and Greg introduced the master plan goals. Abacus outlined the charrette process and outcomes, current plans, short term and long term options and pros and cons. Photomontages of a possible development scenario as seen from Bedford Road were presented.

Abacus also reviewed the outstanding issues the town faces that are related to 338 Bedford Road development but that are also independent: how to meet recreational needs; how to meet the need for a senior and community center; providing long term pedestrian and emergency access to 338 and adjacent site; providing long term site utilities to 338 and adjacent sites. The floor was opened up for discussion. Comments received are listed below:

- Town Hall is overused for community events and school buildings are often not available, so a community center would be a valuable town asset. The Town needs a community center planning process with private groups working with the Planning Board and Selectmen in a public/private collaboration that breaks through funding and planning "silos".
- The Town needs an overall master plan for growth and the development of community facilities. At the same time, citizens should speak up about what they

need from the Town.

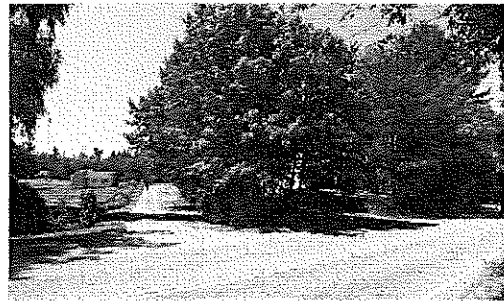
- Safety was a significant concern. The entry to 338 Bedford Road is on a bend in the road and minimizing vehicular traffic and pedestrian crossings was encouraged.
- Infrastructure issues must be addressed. A community center would require a public well but might provide the added flow the waste water treatment facility needs. An open fire pond was discouraged.
- Michael Epstein from the Planning Board, Bill Risso from the Board of Health who has a special needs nephew, and a near-abutter, Scott Richardson from a house in the Bates Farm development nearby, and others supported housing on the front of the site. Their reasons included: a shorter access road and less plowing would be required (by service provider) which would reduce the cost and need for public subsidies; residents would be closer to the road and more connected to civic life; residents would be less likely to be disturbed by vehicular circulation and recreational activities that might connect to Banta-Davis; and smaller scale housing would use the narrower part of the site with the wider portion in the rear for larger community needs. Community facilities at the back could then be accessed separately from Banta-Davis.
- John Williams from the Board of Selectmen and Affordable Housing Trust spoke up about the importance of integrating residents into the community.
- Scott Simpson proposed that housing at the rear would provide more space and privacy for residents

SECTION 3-MASTER PLAN PROCESS MEETINGS WITH TOWN BOARDS

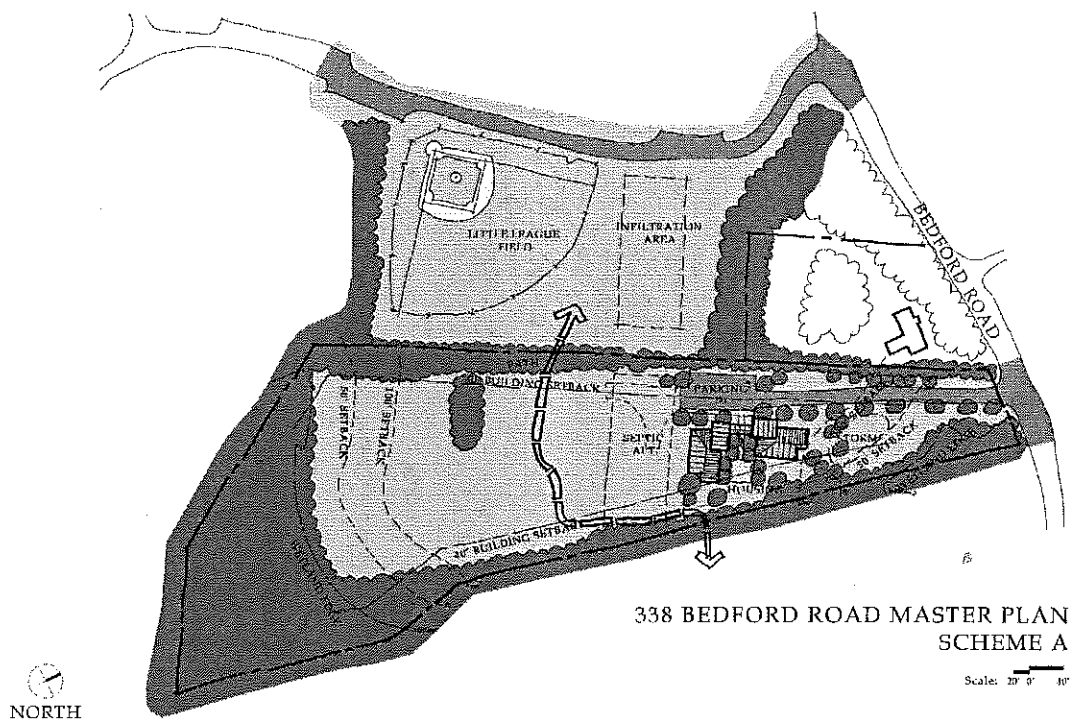
and would be less visible from the road and could be accessed from the Banta-Davis property. He suggested that the housing be prioritized through this siting.

- Barbara Lewis noted in a follow-up email: "Additional uses should be inclusive and multi generational. Many times we see residents of Carlisle long for interaction, but that does not happen in an environment of isolation and privacy. Let's create a situation where disparate people and groups actually collide. Games and music and old folks and those with disabilities and their families, and babies - imagine a hubbub. We get hubbub once a year in this town - it's called Old Home Day. And we love it. Perhaps we could use just a bit more, and as a result, get the most out of this one piece of property."

Views from
Bedford Road
top to bottom:
existing; with two
five bedroom
group homes and
no trees; with
two five bedroom
group homes
and trees along
driveway.



SECTION 3-MASTER PLAN PROCESS
FINAL DESIGN OPTION A - HOUSING ONLY



The housing can be completed first, allowing the remainder of the site to remain open until a final decision is made on how to utilize it. A drive from Bedford Road provides access. Walking trails connect the Banta-Davis property on one side to the Fox Hill Conservation land on the other.

338 BEDFORD ROAD MASTER PLAN REPORT

SECTION 4-DESIGN GUIDELINES

The design charrettes, meetings with Town Boards, and public meetings suggest a general direction for the development of the group homes on the 338 Bedford Road site. Although there may not be unanimity on the siting of the buildings or all of their characteristics, we have developed these guidelines to help structure a Request for Proposals to interested developers and service providers that will result in facilities that meet the Town's needs. Further reviews will be required as the project develops. These guidelines are intended to allow development of the site for other uses in other locations while protecting access to, egress from, and the privacy of the group homes.

Site Development

1. The overall housing site should be located within the boundaries shown on the attached drawing. These boundaries set the required distance from the wetlands adjacent to Bedford Road on the front, and allow space for the development of a leaching field to supplement that on the adjacent Banta-Davis property in the rear.
2. The site should be developed to minimize required regrading while providing access to the site from Bedford Road, access to future development sites to the rear of the site, and allowing storm water management meeting state and local requirements including those of the Conservation Commission and Planning Board.
3. Parking, drop off and entry areas are to be fully accessible meeting MAAB and ADA requirements.

4. Wetlands and existing trees are to be protected and all local and state wetland requirements are to be met.
5. The access drive, parking and turnaround are to meet the requirements of the Service Provider, the Fire Department, and all state and local regulatory bodies.

Building Siting

1. Buildings are to be approximately 2,500 square feet each. Buildings are to be separate structures but sited to define common space between them for a terrace and recreation. They can be connected by an open-sided roofed structure - a pergola or arcade - that could provide overhead protection from the elements.
2. The two buildings are to be located in close proximity to drives and parking for convenience, but spaced far enough away to provide a buffer between buildings and vehicles.
3. Building within the side yard setback adjacent to the Town owned Fox Hill Conservation Area should be considered in order to provide more buffer space between the access road, the buildings, and the adjacent Landers property. It is anticipated that the new access road will be in approximately in the same location as the existing driveway.
4. Buildings should be sited to minimize their impact on the Bedford Road viewscape.

SECTION 4-DESIGN GUIDELINES

Building Massing and Construction

1. Buildings are to be one story and fully accessible with floor level close to grade. Massing should minimize the bulk of the buildings on the site, while providing pitched roofs and variegated forms that reference regional building traditions.
2. Buildings are to be designed to maximize passive solar heating and/or solar water heating/photovoltaic electrical generation. These features may suggest deviations from traditional forms and details. Orientation for solar should not lead to building orientations that conflict with road orientation or the goal of minimizing the impact on the viewscape.
3. Windows, bays, clerestories or dormers should be provided that minimize the need for artificial light during the daytime in rooms including bathrooms and hallways.
4. Buildings and systems should be designed and constructed to meet or exceed all applicable energy codes and requirements for fresh air and indoor air quality.
5. Exterior cladding is to be wood shingles or clapboards or fiber cement clapboard or panels. Vinyl siding is not to be utilized.
6. Windows are to be high performance wood, aluminum or vinyl clad wood, or fiberglass.

Floor Plan Layouts

1. Housing is to meet 521CMR Group 2B requirements.
2. Each of 5 bedrooms are to be minimum of 140 square feet with a 5' by 2' deep closet.
3. Kitchens are to be residential in nature and fully accessible - one in each home.
4. Living and dining areas are to be sized for 8 people; provide an additional sitting or study area.
5. Provide two full bathrooms and a laundry area.
6. Provide a 10' x 10' office - or as required by service provider.
7. Provide mechanical room space appropriate for systems being utilized.
8. Design entries with space for putting on and storing coats and easy access to the access drive and parking. Provide additional doors to outdoor terrace and recreation areas.

SECTION 4-DESIGN GUIDELINES

Landscaping

Walks and exterior patios or terraces should be accessible and provide access from a shuttle bus drop off area to the homes and from the homes to exterior spaces such as patios, terraces or hardcourts such as basketball.

The planting should help to blend the homes into the character of the neighborhood. The homes should have some shrub planting to soften the masses of the building from the street and to ease the transition from the road to the homes. Planting should be used to create some shaded and sheltered spaces outside for the residents allowing for use in all seasons. The areas on the periphery of the parcel should blend into their surrounds while retaining some measure of privacy for the residents. Planting should be maintained as required at the entry to the site to improve visibility and safety.

Site Utilities

Water service: There is no public available water main for this site, therefore the options for the water services for the development will need to be either a private well serving the 10 bedrooms (permitted locally through the Board of Health (BOH)) or tying into the proposed public well to be permitted for the Banta Davis site (through DEP). Order of Magnitude costs for these two options would be approximately \$50,000 to tie into the public well (however the cost would be approximately \$250,000 if this connection were designed to serve a subsequently constructed

Town building on the back of the site) and \$15,000 for a private well.

The Town of Carlisle Well Regulations will require identification of all potential sources of contamination within 200 feet. Development must meet the town's Non-Public Well Setbacks:

Property Lines	25'
Projections of any adjacent buildings	5'
Roadway	25'/15' from
right of way (whichever is greater)	
Pond/Waterbody High mark	25'
Barnyards, Stables, Manure piles	100'
Petroleum Storage Tanks	25'

Stormwater Management: A stormwater mitigation system for the proposed development will be required to ensure that post-development stormwater runoff conditions are equal to or less than the pre-development rates of runoff. The soil at the property is assumed to be well-drained, therefore an infiltration system consisting of a few drywells may be sufficient. This should be verified. A Notice of Intent (NOI) must illustrate to the Carlisle Conservation Commission and Massachusetts DEP that all work within wetland buffers meets the performance standards of the WPA

SECTION 4-DESIGN GUIDELINES

and local bylaws. This process typically takes one to two months after filing and can occur simultaneously with any other permitting / approvals process. Carlisle has regulations regarding the design of stormwater management systems that are very much in line with Mass DEP stormwater management policies. Meeting the state stormwater management standards and referring to the Carlisle regulations for materials and sizing should be sufficient to gain approval.

Sanitary Sewer: There are two potential options for meeting requirements for the residential development's sanitary sewage flow. One option would be tying into the existing School Department Wastewater Treatment Plant (WWTP) that currently has excess capacity. DEP requires that flow on contiguous parcels with the same owner be aggregated and treated / discharged by a common system.

The other option, assuming a long term lease from the Town for the development, would be for the developer to install a stand-alone septic system. Order of Magnitude costs for the construction of these two options would be approximately \$65,000 to tie into the WWTP and \$35,000 - \$45,000 for a private septic system.

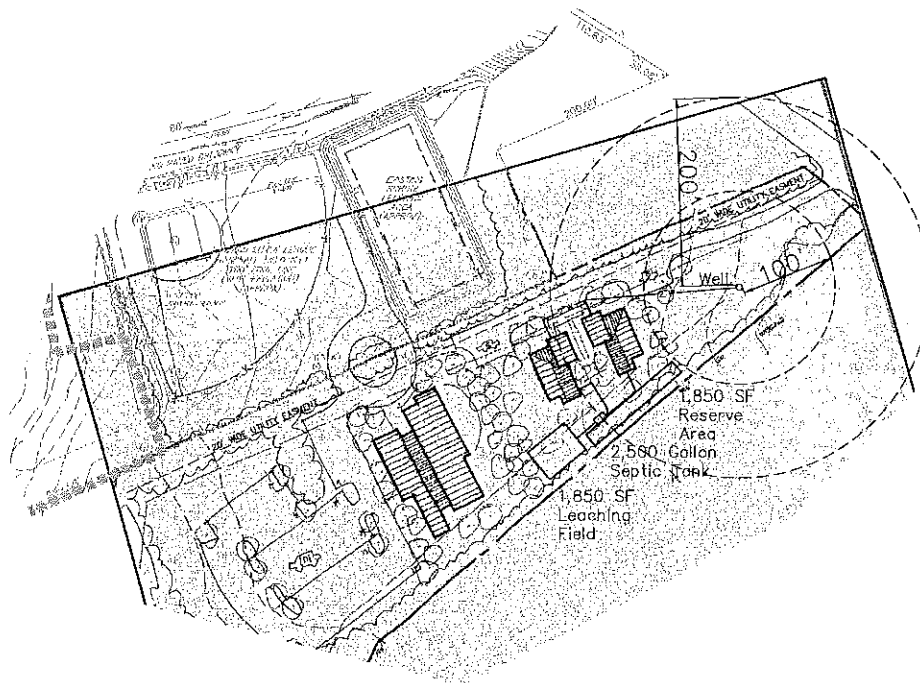
Samiotes Consultants explored septic options with Kevin Brander of DEP (and his subsequent informal discussions with Boston and DEP Legal). Kevin Brander stated that DEP would likely approve the Housing Authority (or other non-Town entity) having sole use of a Title 5 septic system as opposed to tying into the

Town's WWTP. The approval of this use option would be dependent on that entity having written into their long-term lease that they "own, operate and maintain" said septic system. They would then send that agreement to DEP for their approval to design a system that did not tie into the WWTP. The BOH would then need to approve a Title 5 Septic per their regulations and Title 5.

If a T5 septic system is allowed, the leaching field size would be approximately 2,850 sf based upon 10 bedrooms and soils with good drainage properties. There need to be two fields as illustrated on the plan – one for the primary and one for the reserve (with a 10' separation between them). Each house should also have its own dedicated 1,500-gallon septic tank.

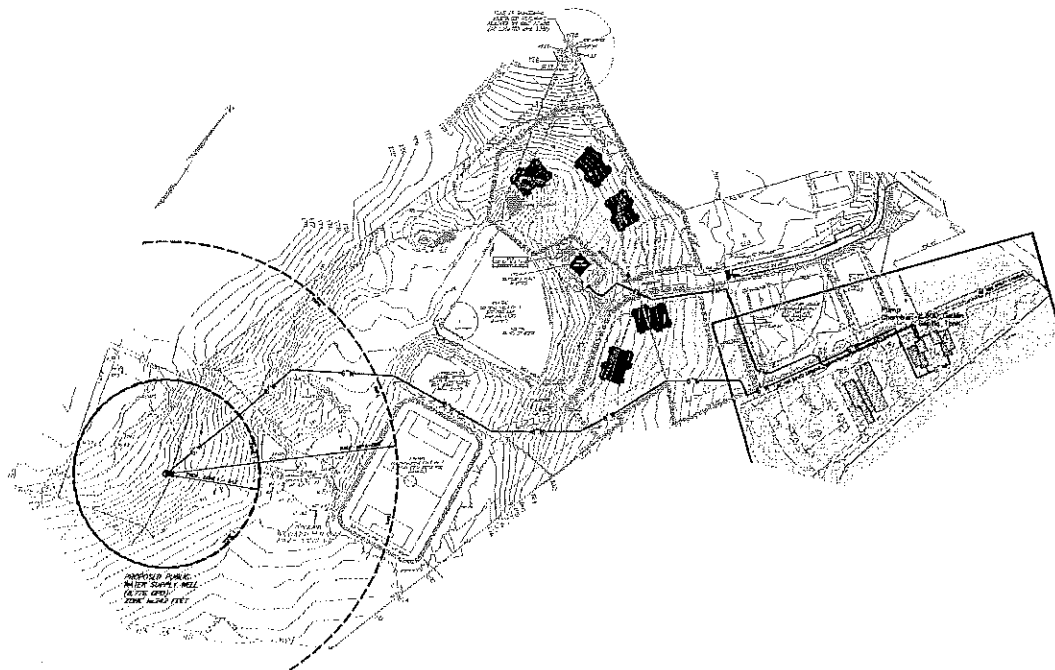
The ability to reduce the septic system (based on the rooms being a "dormitory" use (i.e. 1 person per room as opposed to 2) in lieu of 10 bedrooms should be investigated. As detailed above, we are currently illustrating a leaching field based on bedrooms (100 gallons per day) to be conservative in showing what can be sited for the project with proper setbacks.

SECTION 4-DESIGN GUIDELINES



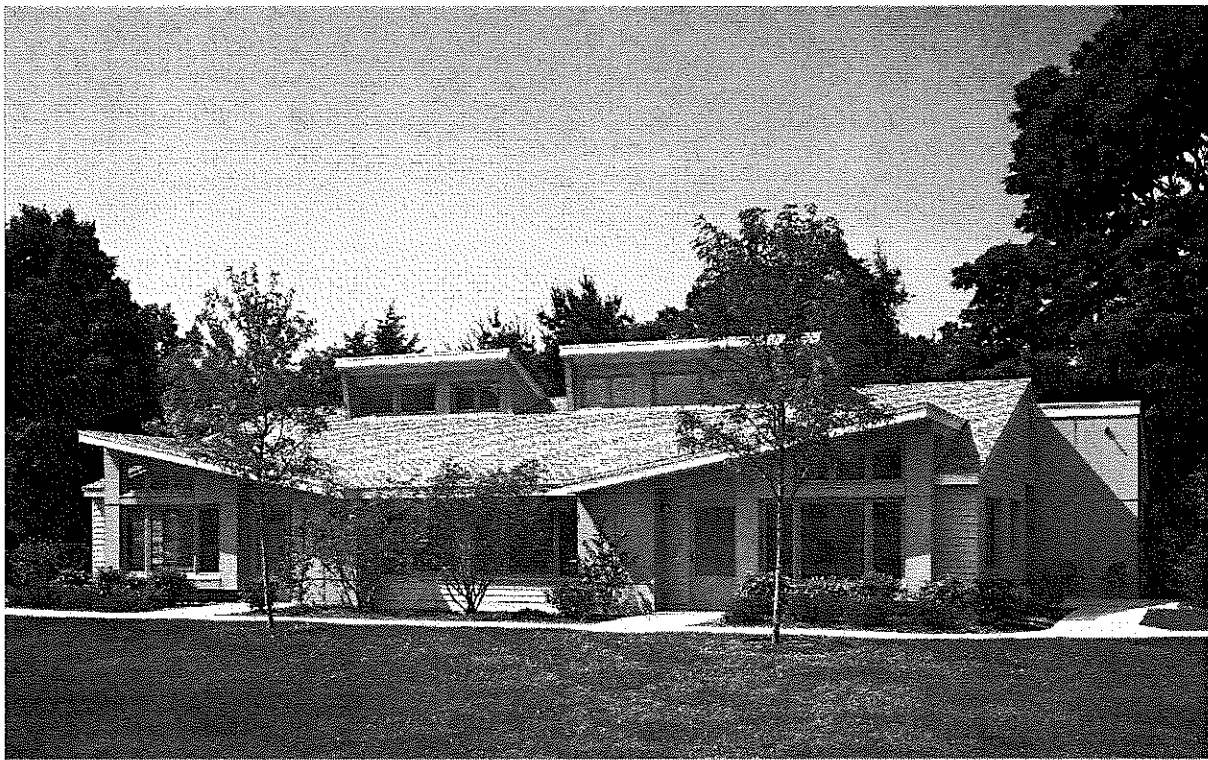
Water supply and septic systems for the group homes can be provided adjacent to them if they meet the criteria illustrated. A community center would require provisions for additional systems.

SECTION 4-DESIGN GUIDELINES



Water supply and septic systems can also be connected to a well and waste water treatment facilities off site. An appropriate decision on these systems should be based on engineering and cost criteria with consideration given to short term and long term development options for the site.

SECTION 4-DESIGN GUIDELINES



DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, STONEHAM, MA
Clerestory windows bring light into the center of the deep flooplate that one story accessible housing usually requires. South facing windows with deep overhangs provide passive solar heating.

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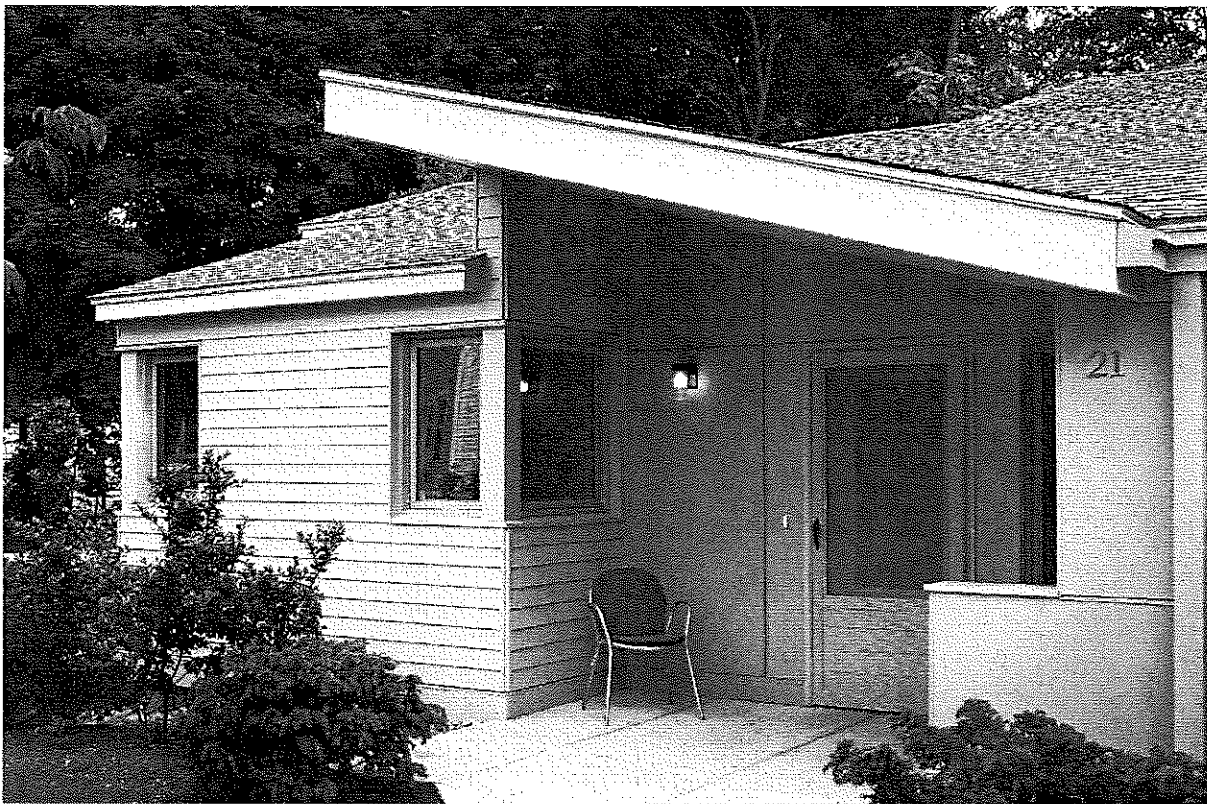
SECTION 4-DESIGN GUIDELINES



DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, STONEHAM, MA
Pitched roofs reflect a regional vernacular adapted to the low profile of accessible housing. Changes in material help break down the scale of the 2,500 square foot

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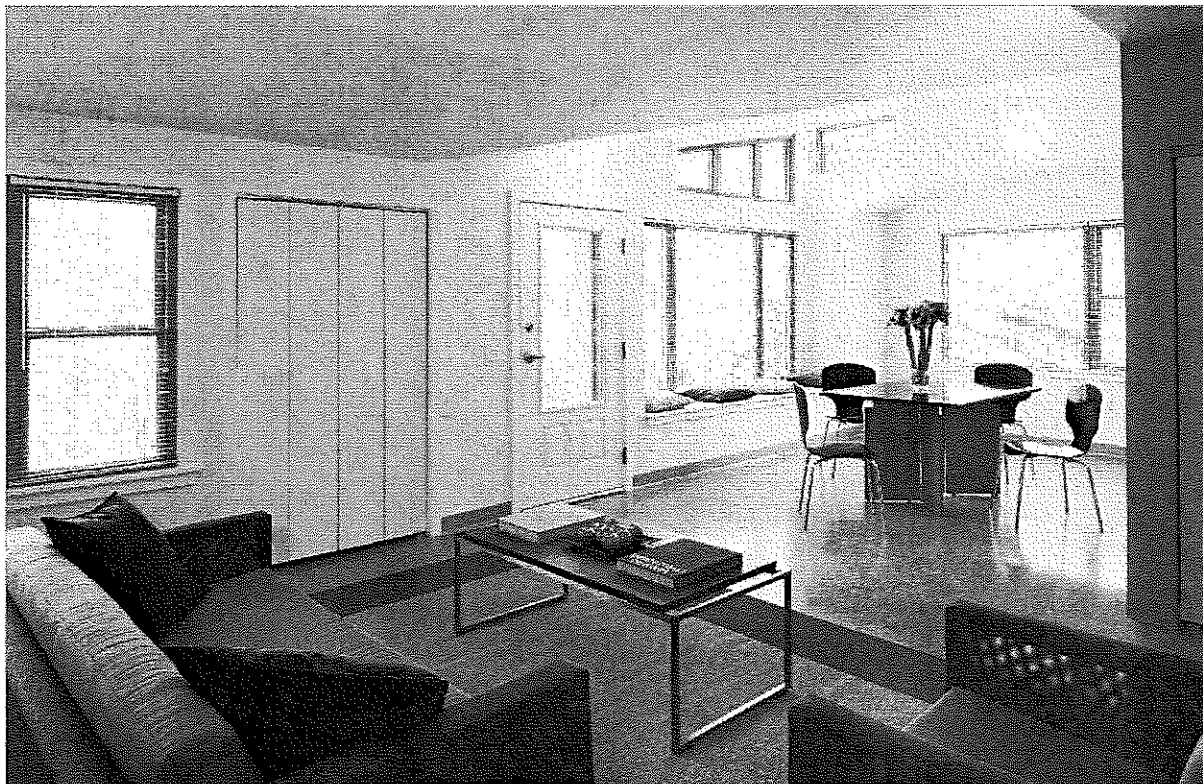
SECTION 4-DESIGN GUIDELINES



DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, STONEHAM, MA
Architectural elements such as porches, bays and corner windows create a comfortable environment for residents and maintain the domestic scale of the neighborhood.

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SECTION 4-DESIGN GUIDELINES



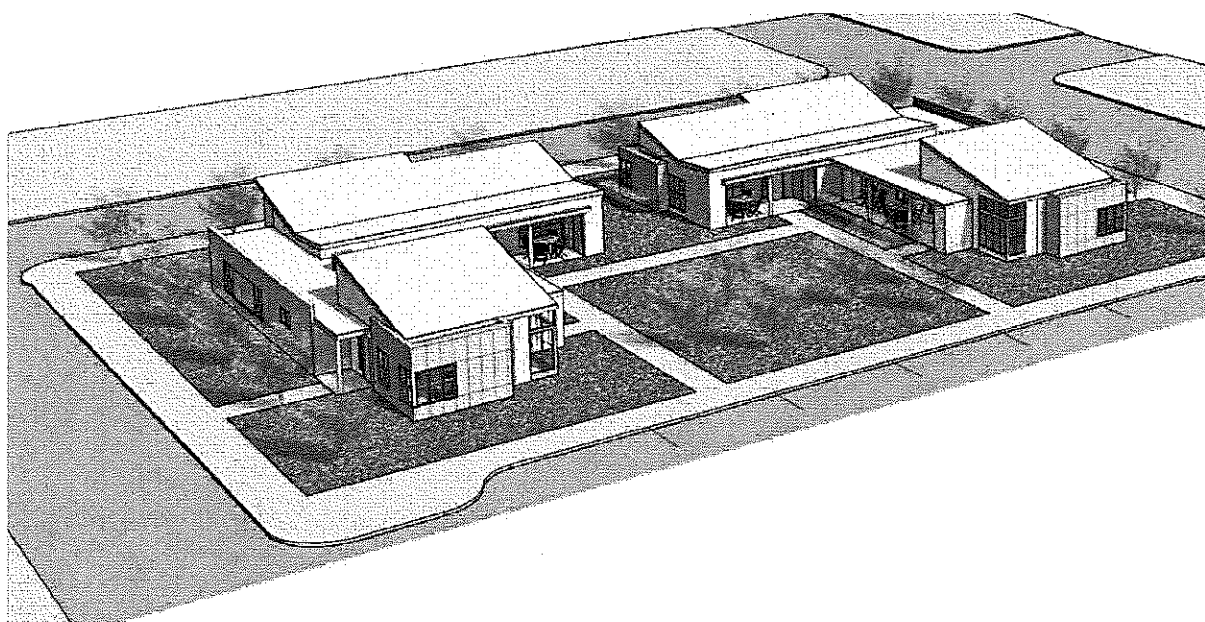
DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, STONEHAM, MA
Natural lighting improves residents' quality of life and reduces energy costs. Clearly defined spaces that open up to one another are comfortable for a single person or a larger group.

SECTION 4-DESIGN GUIDELINES



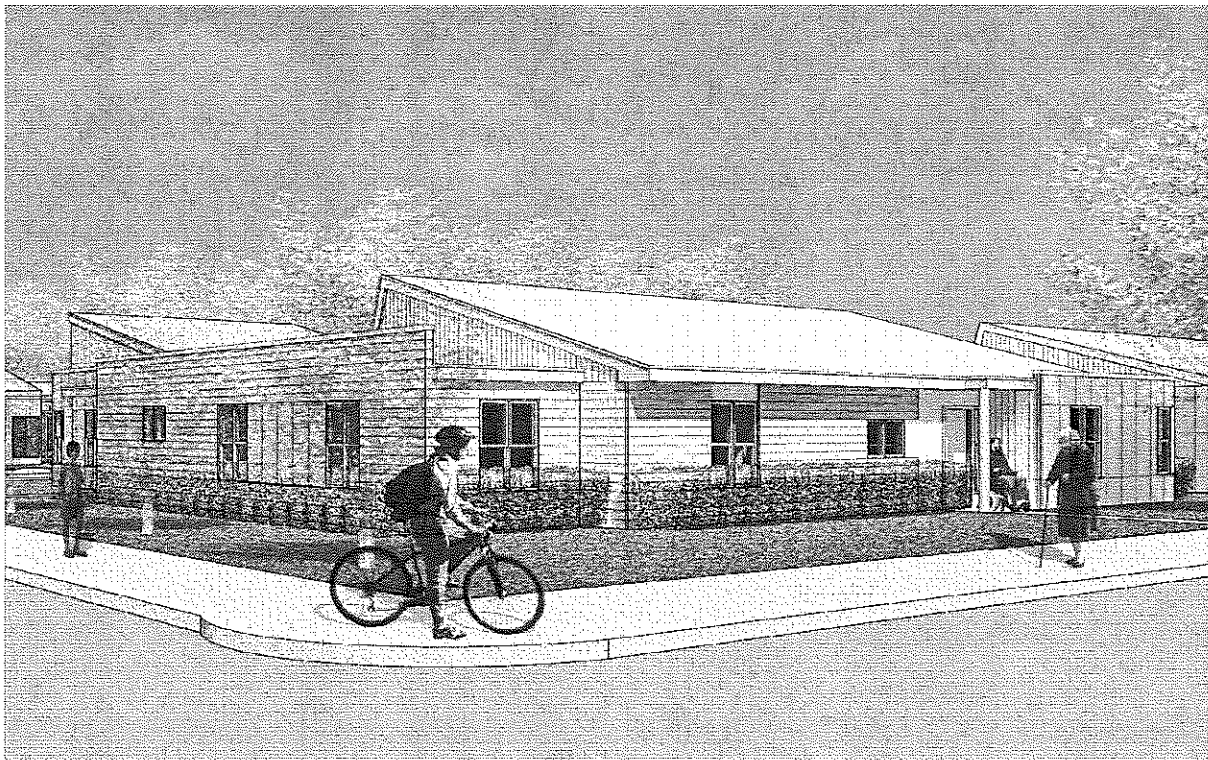
DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, STONEHAM, MA
Open spaces allow shared areas to be furnished and utilized in a variety of ways and respond to the specific needs of residents. They also facilitate use by those with mobility impairments.

SECTION 4-DESIGN GUIDELINES



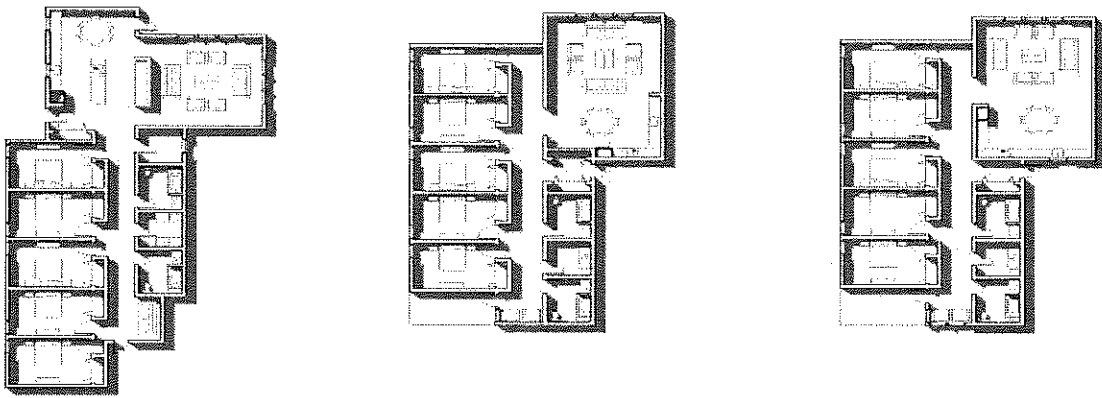
DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, NEW BEDFORD, MA.
South facing roofs are design to maximize potential for solar photo-voltaic panels
or solar domestic hot water. Two five bedroom houses define a shared green space
with a comfortable domestic scale.

SECTION 4-DESIGN GUIDELINES



DESIGN GUIDELINES PROTOTYPE: ACCESSIBLE HOUSING, NEW BEDFORD, MA.
Roofs, walls and windows can be composed to give low but broad accessible housing a comfortable neighborhood scale. Landscaping should tie buildings to the surrounding context.

SECTION 4-DESIGN GUIDELINES



DESIGN GUIDELINES PROTOTYPICAL FLOOR PLANS

The basic program - 5 bedrooms, living room, dining room, kitchen, two bathrooms, laundry, office and sitting area - can be organized in a variety of ways in response to resident and service provider requirements and the surrounding context.

APPENDIX J

1980 Town Meeting vote to purchase Fox Hill property

1974 Town Meeting vote to purchase the Banta Davis property

grant of financial assistance under the provisions of Chapter 132A, Section 11 of the General Laws to enable the Town to acquire for open space and conservation purposes, including outdoor recreation, as provided in Chapter 40, Section 8C of the General Laws, a certain parcel of land believed to be owned by Arie Anderson of Westford and Arvid B. Leelman of Carlisle, said parcel containing 11.22 acres, more or less, on the southwesterly side of Bedford Road, and to execute in the name and on behalf of the Town such contracts and other documents as may be necessary or desirable to obtain such financial assistance, or take any other action relative thereto.

ARTICLE 3. To see if the Town will vote to transfer from available funds the sum of \$587.90 for the support of the Carlisle Police Department budget for the fiscal year ending June 30, 1978, or take any other action relative thereto.

And you are directed to serve this Warrant, by posting up attested copies at the United States Post Office and on the Town Bulletin Board in said Town, fourteen (14) days at least before the time of holding such meeting.

HEREOF FAIL NOT, and make due return of this Warrant, with your doings thereon, to the Town Clerk, at the time and place of meeting, as aforesaid.

Given under our hands this ninth day of June in the year of our Lord one thousand nine hundred and eighty.

PATRICIA S. CUTTER, Chairman
ALFORD S. PECKHAM
ALAN G. CAMERON

Selectmen of Carlisle

A True Copy. Attest:

NANCY L. IOSUE, Constable

MINUTES OF SPECIAL TOWN MEETING

June 24, 1980

A Special Town Meeting was held in the Spalding School Auditorium on June 24, 1980. The meeting was called to order at 8:10 p.m. by Moderator Marshall Simonds. There were 233 qualified voters present. It was voted to waive the reading of the warrant in its entirety.

Article 1. On motion of David B. Land, it was voted that the Conservation Commission be authorized to purchase in the name and on behalf of the Town for open space and conservation

purposes, including outdoor recreation, under the provisions of Chapter 40, Section 8C of the General Laws, as amended, the fee in a certain parcel of registered land located on the southwesterly side of Bedford Road and shown as Lot 17 on Subdivision plan 5429-E, drawn by R. D. Nelson, Surveyor, dated September 5, 1975, filed in the Middlesex North Registry District with Certificate of Title 21054. Said parcel is bounded and described as follows, according to said subdivision plan:

Northeasterly by Bedford Road, eight hundred fourteen and 54/100 (814.54) feet;

Southeasterly by land now or formerly of Thomas A. Green, three hundred sixty and 95/100 (360.95) feet;

Southwesterly two hundred twenty-one and 42/100 (221.42) feet; and

Southeasterly two hundred one and 58/100 (201.58) feet, by land now or formerly of Harriet O. Bates;

Southwesterly four hundred forty and 39/100 (440.39) feet, and

Southerly one hundred three and 86/100 (103.86) feet, by Lot 18; and

Northwesterly by land now or formerly of Lucretia A. Davis, nine hundred ninety-nine and 98/100 (999.98) feet.

Being part of Lot 1 registered to Arvid Bruno Leelman and Arie Anderson (see Certificate of Title 16936 filed with said Registry District).

It was further voted that the Board of Selectmen be authorized and directed to give to the owners of said land, in the manner and within the option period prescribed by Chapter 61A, Section 14 of the General Laws, notice of exercise of the option to purchase the parcel in the name and on behalf of the Town.

It was further voted that the sum of \$90,000 be appropriated for payment of the purchase price, said sum to be allocated to this purpose from the amount appropriated under Article 29 of the warrant for the 1980 Annual Town Meeting.

Article 2. On motion of Mr. Land, it was voted that the Conservation Commission be authorized in the name and on behalf of the Town to make application to the Commonwealth of Massachusetts for a grant of financial assistance under the provisions of Chapter 132A, Section 11 of the General Laws to enable the Town to acquire for open space and conservation purposes, including outdoor recreation, as provided in Chapter 40, Section 8C of the General Laws, a certain parcel of land believed to be owned by Arie Anderson of Westford and Arvid B. Leelman of Carlisle, said parcel containing 11.95 acres, more or less, on the southwesterly side of Bedford Road, and to execute in the name

and on behalf of the Town such contracts and other documents as may be necessary or desirable to obtain such financial assistance.

Article 3. On motion of Patricia S. Cutter, it was voted (Hand Count — 169 YES, 1 NO) that the Town transfer from Surplus Revenue the sum of \$587.90 for the support of the Carlisle Police Department budget for the fiscal year ending June 30, 1978.

It was further voted that the appropriations limit imposed pursuant to Chapter 151 of the Acts of 1979 be increased by \$587.90, so that the appropriations limit as so increased will be \$2,263,671.40.

There being no further business to come before the meeting, the meeting was adjourned at 9:05 p.m.

ELEANOR S. COCHRAN
Town Clerk of Carlisle

WARRANT

SPECIAL TOWN MEETING

November 24, 1980

THE COMMONWEALTH OF MASSACHUSETTS

Middlesex, ss.

To either of the Constables of the Town of Carlisle in the County of Middlesex:

GREETING.

IN THE NAME OF The Commonwealth of Massachusetts, you are hereby directed to notify and warn the inhabitants of said Town, qualified to vote in elections and in Town affairs, to meet at the Robbins Building in said Carlisle on Monday, the twenty-fourth day of November next, at seven o'clock p.m., then and there to act on the following articles:

ARTICLE 1. To see which, if any, of the following locations the Town will designate as the site for a building and related facilities to be used in common by the Fire, Police and Communications Departments:

1. Site A, so called, on the former Conant land, off Lowell Road; or
2. A "split site" consisting of (1) the parcel of Town-owned land on the westerly side of Lowell Road shown as Lot 31 on Sheet 22 of the Assessors' maps and occupied by the present

fire station (to be renovated as a Police/Communications building), together with (b) Site A, so called, on the former Conant land, to be occupied by a new fire station; or

3. A parcel of land situated on the northerly side of Bedford Road, now or formerly owned by Richard and Mabel Bates, consisting of (i) all of Lot 68 as shown on Sheet 22 of the Assessors' maps, (ii) a portion of Lot 69 as shown on Sheet 22 of the Assessors' maps, such portion being bounded on the west by Lot 68, on the south for 100 feet by Bedford Road, on the north by Lot 73 and on the east by the remainder of Lot 69 with a new line of division bisecting the existing Lot 69 running perpendicular to Bedford Road with its southern terminus located 100 feet east of the junction of Lot 68, Lot 69 and Bedford Road, and (iii) a portion of Lot 73 as shown on Sheet 22 of the Assessors' maps, such portion being bounded on the southwest by Lot 68, on the west by Lot 67, on the north by Lot 63, on the east and northeast by the Flood Hazard Area Limit and on the south by Pages Brook, such parcel in its entirety containing seven acres more or less, and having approximately 331 feet of frontage on Bedford Road.

The locations of the three sites are shown on the sketch plan that is attached to and made a part of this warrant. Copies are being mailed to the household of each resident of the Town and are available for inspection at the office of the Town Clerk.

ARTICLE 2. To see if the Town will vote to raise and appropriate or transfer from available funds a sum of money to be used by the Building Committee, subject to approval by the Board of Selectmen, for further planning, engineering and architectural designing for the building and related facilities referred to in Article 1 of this warrant and to be located at the site designated by the vote adopted under said Article, or take any other action relative thereto.

ARTICLE 3. To see if the Town will vote to appropriate a sum of money to be paid by the Selectmen for acquiring an option or options to purchase and/or take by eminent domain in the name and on behalf of the Town, such of the privately owned land or lands referred to in Article 1 of this warrant as may be designated by the vote adopted under said article, such sum to be raised by taxation or by borrowing under Chapter 44, Section 7 of the General Laws or to be transferred from available funds, or take any other action relative thereto.

ARTICLE 4. To see if the Town will vote to transfer a sum of money from the Revenue Sharing Account to a Bond Expense Account to be used by the Town Treasurer for the payment of ex-

Banta-Davis Land

Town

40 acres

ACCESS

Access drive from Bedford Road and Bedford Road access to the pathway leading west to the town center or east to Kimball's Ice Cream.⁴ The trail from Spalding Field off Church Street; trail from Rodgers Road

PARKING

Parking lots off Bedford Road & at Spalding Field

FEATURES

Green Cemetery¹ with over 60 species of lichen including dog, lipstick, and red-capped British soldiers lichen

THE TRAILS

Trails link Spalding Field² and Rodgers Road to the town's soccer, baseball, and track facilities on the Banta-Davis Land.³ A Bedford Road crosswalk provides access to the pathway leading west to the town center or east to Kimball's Ice Cream.⁴ The trail from Spalding goes through wetlands and features a scenic boardwalk (currently flooded by beaver activity). The Rodgers Connector is wet and rocky. To connect with Two Rod Road and Estabrook Woods, turn left on Rodgers Road and right onto Stearns Street, and enter through the Malcolm Land (p. 40).

THE LAND

The Green family, who settled here in the 1700s, formerly owned the Banta-Davis land. The parcel abuts Green Cemetery,¹ and some of the acres are reserved for future cemetery expansion. The rest is set aside for future school use.

Fox Hill

Town

11.2 acres

ACCESS

Bedford Road or Stearns Street

PARKING

Stearns Street at gravel entry to field and trail

FEATURES

Possible vernal pools in NW corner of parcel
Bluebird boxes (2006)

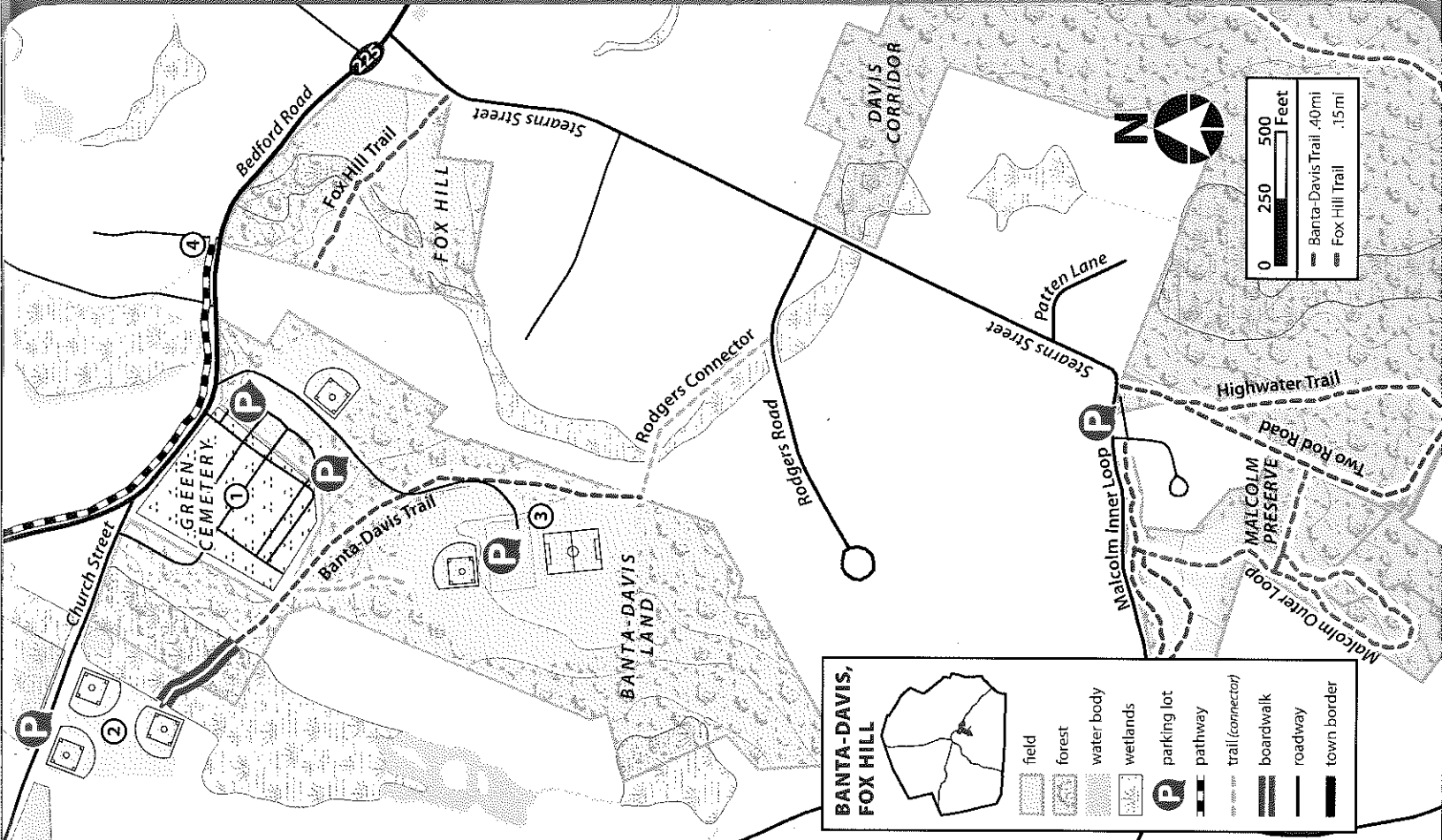
THE TRAILS

Fox Hill Trail is an unmarked trail through a field, a patch of woods with a small stream, and a second field. The Trails Committee does not maintain the trail, but a nearby resident usually mows a walking path across the hay fields each summer. One can also walk around the perimeter of the fields.

THE LAND

The town purchased the Fox Hill conservation land in 1981. The parcel includes the two agricultural fields connected by a short path, which crosses a seasonal stream. The fields offer a nice vista from Bedford Road and Stearns Street. The perimeters offer bird watching opportunities, particularly in winter. Invasive species are displayed in a garden in the smaller, inner field.

Because portions of the land are leased to farmers for haying and gardening, please stay on the mowed path in the center of the fields or on the perimeter.



MINUTES OF SPECIAL TOWN MEETING NOVEMBER 5, 1973

A special Town Meeting was held in the Robbins Gymnasium on November 5, 1973. The meeting was called to order at 7:00 P.M. by the Moderator, Marshall Simonds. There were 368 qualified voters present. On motion duly seconded, it was voted to waive reading of the warrant in its entirety.

Article 1. On motion of Nancy P. Penhune, it was voted unanimously that Article 1 of the Town Bylaws be amended by deleting Section 1 and substituting the following new Section 1:

"Section 1. The Annual Town Meeting shall be held on the first Monday of May in each year."

Article 2. This article was defeated.

Article 3. There was no motion under this article.

It was voted to consider Article 16 at this time.

Article 16. On motion of Robert E. McWalter, it was voted that the Selectmen, acting through the Carlisle American Revolution Bicentennial Commission, be authorized to reprint the "History of the Town of Carlisle, Massachusetts" by Sidney A. Bull for sale by the Town at a price to be established by the Commission acting for the Selectmen, and that the Town transfer from Surplus Revenue the sum of \$2,100.00 to defray the costs of such reprinting.

Article 4. It was voted to waive the reading of the descriptions of the main motion because of their unusual length. Copies of the warrant had been distributed to the voters.

On motion of J. Arthur Taylor, it was voted (hand count 256 YES, 82 NO) that the Selectmen be authorized in the name and on behalf of the Town to take in fee by eminent domain under Chapter 79 of the General Laws for conservation purposes, as provided in Chapter 40, Section 8C of the General Laws, the following parcels of land:

A certain parcel of land located on the southwesterly side of Bedford Road in Carlisle, Middlesex County, Massachusetts, shown as Parcel "A" on a plan entitled "Plan of Land in Carlisle, Mass. owned by John A. Davis," R. D. Nelson, Engineer, dated June 7, 1973 and recorded with Middlesex North District Deeds in Plan Book 117 as Plan 158, containing 55.27 acres.

A certain parcel of land located in Carlisle shown on a plan entitled "Plan of Land in Carlisle, Mass. owned by William Lee, et al.," R. D. Nelson, Engineer, dated February 26, 1969 and recorded with said Deeds in Plan Book 109 as Plan 98, containing 8.02 acres and an area in Two Rod Road measuring 6,035 square feet, more or less.

Three certain parcels of land located in Carlisle shown as Parcels "A", "B" and "C" on a Plan entitled: "Plan of Land in Carlisle, Mass. owned by Henry N. Clark," R. D. Nelson - Engineer, dated August 25, 1972 and recorded with said Deeds in Plan Book 117 as Plan 160, containing 37.6 acres of land.

PROVIDED, that in no case shall the Selectmen acquire said land until application has been made to and approved by the Massachusetts Department of Natural Resources under Chapter 132A, Section 11 of the Massachusetts General Laws for financial assistance amounting to at least 48 percent of the approved acquisition cost.

It was further voted that the sum of \$121,020.00 be appropriated for payment of whatever damages may be assessed or agreed upon in connection with the taking of said land by eminent domain; that to meet this appropriation the sum of \$30,020.00 be transferred from the Conservation Fund, and that the Treasurer with the approval of the Selectmen be authorized to borrow, under the provisions of Chapter 44, Section 7 of the General Laws and to issue bonds or notes of the Town therefor, payable in accordance with Chapter 44, (a) the sum of \$32,000.00 so that the whole loan will be paid in not more than three years from the date of issue of the first bond or note, and (b) the sum of \$59,000.00 so that the whole loan will be paid in not more than one year from the date of issue of the first bond or note; PROVIDED that any reimbursement received by the Town from Massachusetts sources, as aforesaid, shall be applied to the payment of the indebtedness of \$59,000.00 incurred pursuant to the foregoing authorization.

Article 5. On motion of Mr. Taylor, it was voted that the Conservation Commission be authorized to make application in the name and on behalf of the Town to the Massachusetts Department of Natural Resources for a grant of financial assistance under the provisions of Chapter 132A, Section 11 of the Massachusetts General Laws to enable the Town to acquire, for conservation purposes, certain parcels of land located in the Town of Carlisle and to be described in the following sentence, and to execute in the name and on behalf of the Town such other documents as may be necessary or desirable to obtain such financial assistance. The parcels referred to are: (1) Parcel "A" shown on a plan entitled "Plan of Land in Carlisle, Mass. owned by John A. Davis," R. D. Nelson, Engineer, June 7, 1973; (2) the parcel shown on a plan entitled "Plan of Land in Carlisle, Mass. owned by William Lee, et al.," R. D. Nelson, Engineer, February 26, 1969 and believed to be owned at present by Frederick J. Fleming and Christina S. Fleming and (3) Parcels "A", "B" and "C" shown on a plan entitled "Plan of Land in Carlisle, Mass. owned by Henry N. Clark," R. D. Nelson - Engineer, August 25, 1972.

It was further voted that the Conservation Commission be authorized to execute in the name and on behalf of the Town such other documents as may be necessary or desirable to obtain such financial assistance.

Article 6. On motion of Mr. Taylor, it was voted (hand count 205 YES, 92 NO) that the Selectmen be authorized to take by eminent domain, in the name and on behalf of the Town for conservation purposes, a certain parcel of land located in Carlisle, shown on a plan entitled "Plan of Land in Carlisle, Mass., owned by The First Religious Society," R. D. Nelson, Engineer, dated June 1, 1973, and recorded with Middlesex North District Deeds in Plan Book 117 as Plan 159, said parcel being bounded and described as follows:

NORTHWESTERLY: By Two Rod Road (abandoned) as shown on said plan by four distances measuring respectively 81.11 feet, 96.20 feet, 99.90 feet and 85.32 feet;

NORTHEASTERLY: By land now or formerly of Malcolm as shown on said plan by five distances measuring respectively 70.64 feet, 61.11 feet, 81.76 feet, 363.35 feet and 378.76 feet;

SOUTHEASTERLY: By land now or formerly of John A. Davis as shown on said plan by two distances measuring respectively 84.17 feet and 325.91 feet;
SOUTHWESTERLY: By land now or formerly of Malcolm as shown on said plan 1027.03 feet.

Containing 8.93 acres according to said plan, and being the same premises conveyed to George E. Wilkins, James H. Wilkins and Charles M. Reynolds, Trustees of The First Religious Society, Unitarian, of Carlisle by deed of Louise C. Forbush (Doughty) and Rudolph W. Currier, Executors of the Will of Charles Forbush, late of Carlisle, dated June 17, 1929, and recorded with said Deeds, Book 814, Page 157.

Said parcel also includes an area of 5,982 square feet, more or less, in Two Rod Road bounded and described as follows:

SOUTHEASTERLY: By land of The First Religious Society southwesterly of the southwesterly side of Two Rod Road as shown on said plan by four distances measuring respectively 81.11 feet, 96.20 feet, 99.90 feet and 85.32 feet;

SOUTHWESTERLY: By the extension of the northeasterly bound of said Malcolm land a distance of 16.5 feet, more or less, to the center line of Two Rod Road;

NORTHWESTERLY: By the center line of Two Rod Road a distance of 362.5 feet, more or less; and

NORTHEASTERLY: By the extension of the southwesterly bound of said Malcolm land a distance of 16.5 feet, more or less, to the center line of Two Rod Road.

PROVIDED, that in no case shall the Selectmen acquire said land until application has been made to and approved by the Massachusetts Department of Natural Resources under Chapter 132A, Section 11 of the Massachusetts General Laws for financial assistance amounting to 50 percent of the approved acquisition cost.

It was further voted that the sum of \$7,500.00 be appropriated for payment of whatever damages may be assessed or agreed upon in connection with the taking of said land by eminent domain; that to meet this appropriation the sum of \$230.00 be transferred from the Conservation Fund, and that the Treasurer with the approval of the Selectmen be authorized to borrow under the provisions of Chapter 44, Section 7 of the General Laws and to issue bonds or notes of the Town therefor, payable in accordance with Chapter 44, (a) the sum of \$3,520.00 so that the whole loan will be paid in not more than three years from the date of issue of the first bond or note, and (b) the sum of \$3,750.00 so that the whole loan will be paid in not more than one year from the date of issue on the first bond or note; PROVIDED that any reimbursement received by the Town from Massachusetts sources, as aforesaid, shall be applied to the payment of the indebtedness of \$3,750.00 incurred pursuant to the foregoing authorization.

Article 7. On motion of Mr. Taylor, it was voted that the Conservation Commission be authorized to make application in the name and on behalf of the Town to the Massachusetts Department of Natural Resources for a grant of financial assistance under the provisions of Chapter 132A, Section 11 of the Massachusetts General Laws to enable the Town to acquire, for conservation purposes, a certain parcel of land located in Carlisle shown on a plan entitled "Plan of Land in Carlisle, Mass., owned by The First Religious Society," R. D. Nelson, Engineer, June 1, 1973, and to execute in the name and on behalf of the Town such other documents as may be necessary or desirable to obtain such financial assistance.

Because of his personal interest in the next article (Article 8), the Moderator, Marshall Simonds, at this point stepped aside, and Guy W. Clark was elected Moderator for this article.

Article 8. On motion of John W. Shay, it was voted (hand count 228 YES, 29 NO) that the Selectmen be authorized to purchase in fee or to take in fee by eminent domain under Chapter 79 of the General Laws, in the name and on behalf of the Town for cemetery purposes and for school purposes or public works purposes, or both, a certain lot of mowing, pasturing and woodland situated in Carlisle about one-half of a mile southeast of the meeting house, containing 39.8 acres, more or less, being a portion of a larger parcel bounded and described as follows:

EASTERLY: by land formerly of Minot F. and Lillian M. Davis and land formerly of Esther M. G. Stearns;

SOUTHERLY: by said Stearns land and land formerly of Benjamin F. Blaisdell;

WESTERLY: by land formerly of Leonard M. Green and Thomas A. Green and Cemetery Road; and

NORTHERLY: by Bedford Road.

For owner's title see the deed of Lillian S. Davis to Dawn Davis Banta dated September 2, 1969 and recorded with Middlesex North District Deeds, Book 1986, Page 397.

There are excepted and excluded from the above described premises:

1. A certain parcel of land with the buildings thereon situated in Carlisle, bounded and described as follows:

Beginning at a point about three hundred (300) feet easterly of the wall of Green Cemetery located on the southerly side of Boston Road, sometimes called Bedford Road;

THENCE running one hundred and seventy-five (175) feet easterly along the southerly side of said road to a stone wall at land of John Davis, now or formerly;

THENCE turning and running south forty-six (46) degrees west along said wall two hundred and ninety-five (295) feet to a drill hole in said wall;

THENCE turning and running north forty-four (44) degrees west one hundred and fifty feet (150) to a stake in the ground;

THENCE turning and running north forty-five (45) degrees east two hundred (200) feet to the point of beginning.

Said parcel containing 38,000 square feet, more or less, all as shown on a plan entitled "Plan of Land in Carlisle, Mass. Survey for Lillian R. Davis" by Merrill A. Brown, Registered Land Surveyor, dated August 11, 1948 and recorded with Middlesex North District Deeds in Book of Plans 74, Plan 24A.

Being the same premises conveyed to Timothy Landers and Phyllis X. Landers, husband and wife, by deed of Lawrence A. Moseley and Phyllis E. Moseley, husband and wife, by deed dated March 8, 1973 and recorded with said Deeds, Book 2055, Page 419.

2. A portion of the parcel first described shown as Lot "A" on a plan entitled "Plan of Land in Carlisle, Mass. Surveyed for Lillian R. Davis" by Merrill A. Brown, Registered Land Surveyor, dated November 30, 1948, said Lot "A" being bounded and described as follows as shown on said plan:

ARTICLE 29. To see if the Town will vote to accept as a gift for conservation purposes the offer of a parcel of land owned by the Philip C. Heidke Realty Trust, located on the northwesterly side of Brook Street in Carlisle adjoining the Town Forest and containing about 8.03 acres, or take any other action relative thereto.

ARTICLE 30. To see if the Town will accept as a gift the Oscar E. Pedersen Memorial flag pole, or take any other action relative thereto.

ARTICLE 31. To see if the Town will authorize and direct the assessors to take from available funds a sum of money to reduce the tax levy for the current year.

And you are directed to serve this Warrant, by posting up attested copies thereof at the United States Post Office and on the Town Bulletin Board in said Town, seven (7) days at least before the time of holding said meeting.

HEREOF FAIL NOT, and make due return of this Warrant, with your doings thereon, to the Town Clerk, at the time and place of meeting, as aforesaid.

Given under our hands this fifteenth day of March in the year of our Lord one thousand nine hundred and seventy-eight.

ALFORD S. PECKHAM, Chairman
HOWARD E. HENSLEIGH
NANCY P. PENHUNE
Selectmen of Carlisle

A True Copy. Attest:
RICHARD P. HERSEY, Constable

MINUTES OF ANNUAL ELECTION AND TOWN MEETING

March 28, April 4, 5, 1978

The annual Town Election was held on March 28, 1978 at the Town Offices.

Article 1. The polls were opened at 7:00 a.m. by the Warden, Harriet Fortier, and were declared closed at 8:00 p.m. A total of 667 ballots were cast, of which 18 were absentee ballots. After the ballots were counted and the vote recorded, the following results were announced by the Clerk of Elections, Sarah Andreassen:

Moderator — One Year	554
Marshall Simonds	10
Charles Brown	103
Blanks	
Selectman — Three Years	589
Patricia S. Cutter	78
Blanks	
Assessor — Three Years	451
David N. Keast	177
Robert F. Seibel	39
Blanks	
School Committee — Two for Three Years	475
Marion G. Eliassen	478
John W. Boynton	240
D. Diane Geis	141
Blanks	
Library Trustee — One for Three Years	580
Brenda M. Beckman	87
Blanks	
Planning Board — Two for Five Years	493
Vivian F. Chaput	523
Thomas J. Raftery	318
Blanks	

The adjourned meeting was convened on Tuesday, April 4, 1978, at the Robbins School and was called to order at 7:15 p.m. by Moderator Marshall Simonds. 311 qualified voters were present. The invocation was given by Rev. Keith G. Greer of the Congregational Church.

It was voted to waive the reading of the warrant in its entirety and the Moderator was instructed to read each article as it came before the meeting.



Town of Carlisle

MASSACHUSETTS 01741

Office of
BOARD OF SELECTMEN

January 10, 1974

Mrs. Lillian Davis
Box 1273
Cambria, California 93428

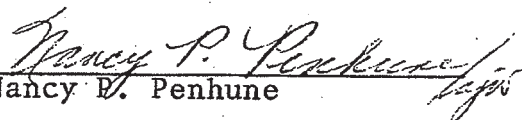
Dear Mrs. Davis:

This is to formally notify you that on December 27, 1973 the Board of Selectmen, acting on behalf of the Town, took by eminent domain your parcel of land on the southerly side of Bedford Road in Carlisle containing approximately 38.74 acres. This land will be used by the Town for cemetery, school or public works purposes. For this taking you have been awarded damages in the amount of \$63,600.

All of the other details of this taking have, I am sure, been explained to you fully by your attorney, Mr. Leonard Rae, and we would like to thank you and Mr. Rae for your cooperation in this acquisition for the Town.

Best wishes for 1974.

Sincerely,


Nancy P. Penhune

NPP/ajw

cc: Messrs. D. Bickford
A. Peckham
W. Koerner

(File)



Town of Carlisle

MASSACHUSETTS 01741

Office of

BOARD OF SELECTMEN

Tel. (617) 369-6136

February 24, 1987

TO: Town Building Committee
FROM: Board of Selectmen
RE: Town Hall on Banta-Davis Land

You requested some information on what procedure would be necessary for the Town to use a portion of the Banta-Davis land as a site for Town Hall.

- (1) A plan of the particular piece of land desired for Town Hall should be completed.
- (2) Both the School Committee and the DPW would have to give a "preliminary release" of the parcel. The preliminary release is given if the parties in control of said property (in this case, the School Committee and DPW) find this portion of land to no longer be needed for their use.
- (3) Town Meeting must vote to change the custody of the parcel of land on the plan from School Department and DPW to the Selectmen for municipal administrative purposes. This would need a 2/3 vote of Town Meeting.

It probably sounds more complicated than it is. The first step would really be to see if the School Committee would be amenable to this type of use on the land.

Katharine B. Simonds
Katharine B. Simonds
For the Board of Selectmen

KBS/ajw

APPENDIX K

2010 Site Feasibility and Approval to Occupy for the Home and Site-based Respite Services

Site Feasibility and Approval to Occupy for the Home and Site-Based Respite Services

Introduction and Purpose

The Site Feasibility and Pre-Placement review is conducted to determine if a proposed home¹ offers a safe and suitable living environment for individuals before they move in. The review is designed to provide technical assistance to providers and Area/Regional staff by identifying any features of the home affecting the well-being of individuals that would need to be addressed before it can be occupied.

The role of the Office of Quality Enhancement (OQE) is to support both the provider and DDS Area Office when they are locating and opening a home. Therefore, it is important that the OQE be involved early in the decision to relocate or open a new home by conducting the **Site Feasibility Assessment** of the potential location(s) before a home is leased or purchased by the provider.

The **Pre-Placement Review** is conducted when the home is ready for occupancy in order to issue an **Approval to Occupy**. An Approval to Occupy must be issued before individuals may move into the home.

Applicability of Site Feasibility and Approval to Occupy Requirements

For the purpose of these procedures, a Site Feasibility and Approval to Occupy is required for all living situations where 24 hour staffing is provided and the home is leased or owned by the provider and for site-based respite services.

While other types of living situations (e.g., homes providing less than 24 hour staffing, placement services) do not require an Approval to Occupy by the Office of Quality Enhancement staff may upon request consult with providers and DDS staff on the feasibility of a proposed home.

Site Feasibility

1. The Regional or Area Director is responsible for notifying the provider that approval from the Quality Enhancement Division is required by DDS before a final selection of property is made. This approval should precede a purchase of a property or signing of a lease.
2. As soon as a potential location is identified, the provider contacts the Regional Quality Enhancement Director who is responsible for the city or town where the home will be located. The Intake Form is completed by the Regional OQE based on information received from the provider. A copy of the intake form is sent (within 24 hours) to the DDS Area Office so the Area Director is informed that this location is being considered by the provider. This is to ensure that the Area Office is notified early in the process and can work with the provider in

¹ For the purposes of Site Feasibility and Approval to Occupy, “home” refers to residential supports and site-based respite services owned or leased by the Provider.

determining if the location is appropriate (evaluation of location as it relates to other homes nearby) as well as the appropriateness for the specific individuals who will be living in the home. Prior to scheduling the site feasibility visit with the provider, QE needs to confirm with the Area Office that this location is acceptable from their perspective.

3. The QE Director assigns a Quality Enhancement Specialist to conduct a **Site Feasibility Assessment (Forms A and/or B)** of the potential location. The QE Specialist distributes the QE Guidelines (Inspections expected at pre-placement) to the provider at the time of the site feasibility.
4. As a result of the assessment, the QE Specialist determines if the home is either not feasible or potentially feasible. If the location is potentially feasible and the provider decides to proceed, the Quality Enhancement Specialist issues a **Site Feasibility Report (Form C)** listing any modifications or other requirements that must be completed prior to occupancy. The QE Specialist may opt to develop a letter as an adjunct to the Form C to outline those requirements necessary for completion. This information is sent to both the provider and the area office. During this time the provider applies to the Local Building Authority for the applicable building permits, should any renovations of the home be anticipated. An initial data sheet will be completed with the information currently available so that the home can be issued a QE site identification number.

Approval to Occupy

1. Once the provider has made all the necessary renovations, repairs, and all needed furnishings and equipment are at the home, the QE Specialist conducts a Pre-Placement Review in order to complete the Approval to Occupy. This may occur over one visit or several, depending on the schedule of moves anticipated to occur. The Pre-Placement review includes the following:
 - a. **Pre-Placement Requirements Checklist (Form D)** which is completed to verify that the home meets all requirements and to document any items that must be completed before individuals can move into the home. The QE Specialist will also ensure that all items listed in either Form C or a site feasibility letter, have been fully addressed.
 - b. A fire drill which is conducted with all individuals (a fire drill is not conducted for site-based respite) in order to determine that they are able to evacuate the home in 2 1/2 minutes with or without staff assistance. (Prior to the pre-placement the provider needs to ensure staffing is sufficient by conducting training and fire drills in advance of the pre-placement.) The QE Specialist completes a report documenting the results of the fire drill (**Form E**). If all individuals are not identified or ready to move in at the time of the review, as individuals are ready for placement, the QE Specialist must conduct subsequent fire drills until the home has reached its full capacity.
 - c. Each individual taking medication must have required information in place. For each individual moving into the home, a review of practitioner's orders, medication chart information, container labels, and side effects must be made. The QE Specialist must conduct subsequent visits for these individualized reviews, until the home reaches capacity.

- d. The conduct of additional visits to complete individualized medication reviews and/or individual fire drills by the QE Specialist may be delayed and combined with other visits by the QE Director in rare instances. If and only if other fire drill and/or medication reviews have been conducted by the QE Specialist (e.g. due to staggered moves) for this location and the provider is able to confirm that the individual was able to evacuate in 2.5 minutes and that this individual's medication information was in place, the visit can be postponed to coincide with the next person's move in.
2. Upon successful completion of the fire drills and all items on the Pre-Placement Requirements Checklist, the Quality Enhancement Specialist completes the **Approval to Occupy (Form F)**. Only when Approval to Occupy is issued by the QE Specialist and when the Local Building Authority approves of any renovations that have been done can individuals move into the home. There may be circumstances when the Approval to Occupy cannot be issued. In those instances the Approval to Occupy form will list the issues to be corrected and the QE Specialist will follow-up to verify that corrective action has been taken. Once corrected, the Approval to Occupy will be finalized. Final DDS Approval to Occupy is solely a Quality Enhancement function, and is not the prerogative of any local building, health or fire official. However, documentation of local authority approval (e.g., Fire, Building) for any renovations is required and must be available for the Pre-Placement Review. In the event of staggered moves, separate Approvals to Occupy are issued based on completed drills and Medication reviews, until the home reaches capacity.
3. Once the entire process is completed, the Quality Enhancement Specialist sends the final data sheet, the site feasibility Form C, the pre-placement Form D, fire drill report Form E (for all members of the household) and a copy of the final Approval to Occupy to the Director of Licensure and Certification. The data is entered in Central Office and a copy of the data sheet is sent to the Regional Office that conducted the review and, when needed, to the "host" QE Regional Office for the survey and certification of the provider.

**DEPARTMENT OF MENTAL RETARDATION
QUALITY ENHANCEMENT DIVISION**

A. SITE FEASIBILITY ASSESSMENT FOR THE HOME*

*This Assessment is based on the State Building Codes (B); Sanitary Code (S); and the DMR regulations.

QE Specialist: _____

Provider: _____ Proposed Address: _____ Date: _____

Reg. Ref.	Requirement	Guideline	✓	Comments
(DDS) 7.07(5)(c)	<u>Living Room, Den Or Other Activity Room</u> Access to the room is designed to prevent intrusion upon the individuals' bedrooms.	The living room, den, etc. are only accessible from other commonly used areas of the home.		
(DDS) 7.07(5)(a)	The room is large enough to accommodate group and individual needs.	When needed, the room can accommodate all the individuals living in the home. The room can accommodate furnishings such as couches, comfortable chairs, coffee tables, stereo, TV, and open area for social gatherings and other uses.		

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.250(B)	<u>Living Room, Den Or Other Activity Room</u> , cont. The room has at least 2 separate operable wall outlets; <u>or</u> 1 operable wall outlet and one operable electric light fixture.	The room has electric outlets for light fixtures and other uses (e.g., stereo, TV, lamps).		
(S) 410.401(A)	At least 1/4 of the floor area has a floor-to-ceiling height of 7 feet or more.	The floor-to-ceiling height allows for comfortable movement around the room.		
(S) 410.250	Window area is equal to at least 8% of the floor area.	There is natural and artificial light in the room.		
(S) 410.280(A)	There are operable windows, skylights, doors or transoms in an amount equal to at least 4% of the floor area or mechanical ventilation is provided.	There is natural and/or mechanical ventilation in the room.		
(DDS) 7.07(5)(a)	<u>Kitchen, Pantry And Dining Room</u> The kitchen is large enough for meal preparation, cleaning, storage, and free movement around the room.	If there is not a separate dining area, there is enough room for individuals and staff to dine comfortably.		
(S) 410.100	Kitchen surfaces are smooth, non-porous, and free from defects that make them difficult to clean.			

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.251(C)	<p><u>Kitchen, Pantry And Dining Room</u>, cont.</p> <p>In the kitchen there are operable windows in an amount equal to at least 4% of floor area or mechanical ventilation is provided.</p> <p>Where the kitchen area exceeds 70 square feet, there is window space which admits outdoor light in an amount equal to at least 8% of floor area.</p>	There is natural and/or mechanical light and ventilation.		
(DDS) 7.07(5)(c)	Access to the kitchen and dining room is designed to prevent intrusion upon individuals' bedrooms.	The kitchen and dining room is accessible only from the commonly used areas of the home.		
(S) 410.251 (A&B)	The kitchen has at least one electric light fixture and two wall-type outlets.			
(S) 410.250(B)	Where there is a separate dining room, it has at least 2 operable separate wall outlets; <u>or</u> 1 operable wall outlet and 1 operable electric light fixture.	If there is a separate dining room, there are electric outlets for lighting fixtures and other uses.		
(DDS) 7.07(5)(b)	The dining area is of sufficient size to permit all individuals and staff to eat together.			

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.401(A)	<u>Kitchen, Pantry And Dining Room</u> , cont. At least 1/4 of the floor area has a floor-to-ceiling height of 7 feet or more in the kitchen and dining room.	The floor-to-ceiling height allows for comfortable free movement around the dining room.		
(DDS) 7.07(6)(a)	<u>Bedroom(s)</u> Each bedroom is at least 90 - 100 square feet for a single individual; and 130 - 144 square feet for two individuals.	Each bedroom can accommodate storage for clothing and other personal items (e.g., closet, bureau, wardrobe); bed(s); night table; and open area.		
(S) 410.250(A)	Window area is equal to at least 8% of floor area. There are openable windows in an amount equal to at least 4% of floor area or mechanical ventilation is provided.	There is natural light and ventilation.		
(S) 410.401	No room is used as a bedroom if more than half of its floor-to-ceiling height is below grade and is subject to chronic dampness.	Any bedroom that is below grade is free of dampness and has natural light and ventilation.		

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.259(B)	<u>Bedroom(s)</u> , cont. Each bedroom contains at least 2 separate operable wall outlets or 1 operable wall outlet and 1 operable electric light fixture.	There are light fixtures and/or receptacle for individuals' personal furnishings equipment (e.g., lamps, clocks, TV, stereo).		
(S) 410.401	At least 1/4 of the floor area of each bedroom has a floor-to-ceiling height of 7 feet or more.	The floor-to-ceiling height of each bedroom allows for comfortable, free movement around the room.		
	<u>Bathroom(s)</u> For every 4 people living in the home there is at least one bathroom containing a toilet; washbasin and shower or bathtub. For every 5 people or more living in the home there should be at least two full bathrooms.	For every 5 people or more living in the home there should be at least two full bathrooms.		
(DDS) 7.07(5)(c)	Access to each bathroom is designed to prevent intrusion upon individuals' bedrooms.	The bathroom(s) is accessible from the common areas of the home (e.g., hallway, living room, kitchen).		

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.252	<u>Bathroom(s)</u> , cont. The bathroom contains at least 1 operable light fixture.	There is natural and/or mechanical light and ventilation.		
(S) 410.280(B)	There are openable windows, skylights, or doors in the exterior walls or roofs in the amount equal to at least 4% of the floor area or mechanical ventilation is provided.			
(S) 410.150(D)	The toilet, washbasin, shower and/or bathtub have a smooth, non-porous, easily cleanable surface.	The bathroom, including the fixtures, is in good repair and easily cleanable.		
(S) 410.504(B)	Floors and walls up to a height of 48% are constructed of non-absorbent material that is easily cleanable.			
(S) 410.253	<u>Interior Stairways, Hallways, And Foyers</u> All hallways, foyers, and stairways are provided with operable electric light fixtures sufficient to allow for their safe and reasonable use by individuals.			
(S) 410.503(A)	There is at least one handrail on each stairway.			

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.503(B) (B) 1022.2.2 exception 2.	<u>Interior Stairways, Hallways, And Foyers</u> , cont. There is a wall or guardrail on the open side of all stairways that is no less than 30 inches in height.	Any wall or guardrail replaced or constructed after August 28, 1997 is no less than 30 inches or more than 38 inches in height.		
(S) 410.500	Treads, risers and balusters are in good repair.	All stairways, etc. are in good repair (e.g., no visible signs of cracks, loose boards). If stairways are carpeted, they must allow for safe use by individuals (e.g., no worn areas, holes, rips, extensive frays).		
(S) 410.503(D)	Railings have balusters are placed at intervals of no more than 6 inches.	If constructed or replaced <u>on or after August 27, 1997</u> , the spacing is not greater than 4 1/2 inches.		

Reg. Ref.	Requirement	Guideline	✓	Comments
(B) 3603.16.10 .3	<u>Fire Protection Systems*</u> There is at least one approved smoke detector on each habitable level including basements or cellars.	*If the home was constructed, a bedroom was added, or where the existing fire protection system was upgraded on or after August 27, 1997, the fire protection system must comply with 3603.16.1 of the Sixth Edition of the Massachusetts State Building Code (See attached). If the fire protection system is newly installed, the provider must obtain verification that it has been approved by the Local Building Authority before an Approval to Occupy can be issued.	✓	
(DDS) 7.07(7)(c)	If more than one detector is required per dwelling unit, each detector is interconnected so as to activate all other detectors.			
(B) 3603.16.10 .4	On any floor, level or story exceeding 1200 square feet in area, one approved smoke detector is provided for each 1200 square feet or part thereof.			
527 CMR 31.00	Carbon monoxide detector(s) are placed on each habitable level of the home. Carbon monoxide detectors shall not exceed 10 feet in any direction from any bedroom door.			
(S) 410.451	Smoke detectors are located outside bedrooms on every floor of the home.			

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Reg. Ref.	Requirement	Guideline	✓	Comments
(DDS) 7.05(5)(d)	<u>Attic, Basement, And Laundry And Storage Areas</u> There is a conveniently located storage area within the home which is adequate in size to store a reasonable amount of individual and group possessions.	There is a storage area adequate in size to provide additional storage space for each person's personal and household possessions.	✓	
(S) 410.401 (A)	Rooms where more than 75% of the floor area is less than 7 feet is not used by individuals for living, sleeping, or preparing meals.			
(S) 410.402	No room or area may be used as living space if more than 1/2 of its floor ceiling height is below grade and is chronically damp.			
(DDS) 7.07(3)	Basement/cellar is water tight.	There is no visible evidence that the basement/cellar has water leaking in from the outside.		
(S) 410.253(A)	Electric light fixtures and switches are located in the laundry for safe and reasonable use.	There is natural and/or artificial light in the laundry area.		

Reg. Ref.	Requirement	Guideline	✓	Comments
(B) 3618.1	<p><u>Attic, Basement, And Laundry And Storage Areas</u>, cont.</p> <p>The washer and dryer are properly installed and vented (plumbing, electric, gas).</p> <p>All dryers must vent to the outside of the building unless the dryer system has been approved by the Board of Building Regulations and Standards (BBRS).</p>	<p>If an alternative to an exterior venting dryer is proposed, it must be approved by the local building authority.</p>		
(S) 410.353	<p>Asbestos material is free from defects including, but not limited to holes, cracks, tears or any looseness that may allow release of asbestos, dust or materials.</p>	<p>This is especially apparent in basements or cellars on or around furnaces and pipe wrappings.</p>		
(DDS) 7.07(3)	<p><u>Heating Equipment</u></p> <p>There is no fuel-burning heating equipment (stove, furnaces, water heaters or boilers) in a means of egress such as a hallway, corridor or stairway.</p>	<p>No heating equipment is located in any hallway or stairway.</p>		
(S) 410.200	<p>All heating systems and equipment must be operating and in good repair. (Check the inspection tag on the furnace for all except electrical heating systems).</p>	<p>There are no free standing space heaters.</p>		

Reg. Ref.	Requirement	Guideline	✓	Comments
(DDS) 7.07(7)(a)	<u>Exits & Exterior Stairways</u> The home has two means of egress from floors at grade; all other floors above grade have one means of egress and one escape route serving each floor and leading to the ground.	Escape routes can include, but are not limited to connecting doors, porches, windows within six feet of grade, ramps, fire escapes, balcony evacuation systems, etc.		
(B) 1017.4	Exit doors must be easily openable by hand from inside without the use of keys.	Draw bolts, chain latches, and hooks and eye locks may not be used on exit doors.		
(DDS) 7.07(7) (a)&(b)	There are no double cylinder deadbolt locks that require key operation on egress doors. There are no locks on bedroom doors which provide access to an egress.	Exits must not be located in a room with a lockable door.		
(S) 410.253	Each exitway is furnished with exterior lighting, operable from inside and adequate to ensure its safe and reasonable use by individuals.	There is exterior lighting at each exitway, operable from the inside and providing safe access to a meeting place.		

Reg. Ref.	Requirement	Guideline	✓	Comments
(S) 410.503(c)	<u>Exterior and Yard</u> Each porch, deck, balcony or roof intended for use by staff and individuals which 30 inches or more above the ground has a wall or guardrail at least 36 inches high.	There is a railing provided on each porch, balcony or deck that is in good repair. (Any wall replaced or constructed in Use Group R-3 <u>on or after August 28, 1997</u> must be at least 42 inches high).		
(S) 410.253(a)	Each porch deck or patio is provided with sufficient lighting to ensure safe and reasonable use by individuals.	There are lights provided on each porch, deck or balcony.		
(S) 410.500	Gutters and downspouts are secured properly, with no visible evidence of missing segments.			
(DDS) Pool Policy	The pool must have features which would allow safe use by individuals. In addition, the pool has safety features to protect individuals when not in use (e.g., secure covering, sensor device, fenced in and locked).	The QE Specialist may require documentation that the pool meet state codes and local ordinances.		
(DDS) 7.07(3)	The yard is free of any visible hazards and debris. Fences, sheds, and/or garage are in good repair.			

Reg. Ref.	Requirement	Guideline	✓	Comments
(DDS) 7.07(5)(a)	<u>Other Appearance and Design Features</u> There is space for individuals to have privacy.			
(DDS) 7.03(1)(c)2	The home is located where there is access to community resources and amenities (e.g., stores, places of worship, library, hospital).			
(DDS) 7.07(5)(b)	The home blends in with other homes in the area or neighborhood and is free of stigmatizing features.			

780 CMR 3603.16 FIRE PROTECTION SYSTEMS

3603.16.1 General: All one and two family dwellings hereafter constructed shall be equipped with a *household fire warning system*, in accordance with the provisions of 780 CMR 3603.16. All devices shall be installed and maintained in accordance with the requirements of 780 CMR 3603.16, manufacturers instructions and listing criteria and otherwise shall be installed and maintained in accordance with Chapter 2 of NFPA 72 and 527 CMR 12.00 as listed in **Appendix A**.

Exception: In addition to the requirements of 780 CMR 3603.16.1, two family dwellings that contain common areas such as basements, hallways and/or interior stairways that serve both dwelling units, but are not within the dwelling units shall be provided with multiple station smoke detectors or a listed control unit with automatic smoke detectors and occupant notification appliances in the following locations.

1. In all common basements.
2. In all common hallways.
3. In all common stairways on each level outside the dwelling unit doorways.

Each detection device shall cause the operation of an alarm that is clearly audible in all bedrooms over background noise levels with all intervening doors closed. Such devices shall be installed in accordance with NFPA 72 and 527 CMR 12.00 as listed in **Appendix A**.

3603.16.2 Compatibility: All devices and/or combination of devices and equipment shall be approved and listed for the purposes for which such devices are to be utilized.

3603.16.3 Smoke detectors: All detached one and two family buildings, including *manufactured homes* in accordance with 780 CMR 35, shall contain listed single and multiple station smoke detectors or other *household fire warning systems* in compliance with ANSI/UL 217 and/or ANSI/UL 268 (listed in Appendix A) and conforming to 780 CMR 3603.16; *such household fire warning systems* shall be installed and maintained in accordance with the requirements of 780 CMR 3603.16, manufacturers instructions and listing criteria and otherwise shall be installed and

maintained in accordance with Chapter 2 of NFPA 72 and 527 CMR 12.00 as listed in **Appendix A**.

36-3/16/4 Heat detectors: (Reserved)

3603.16.5 Primary electrical power for single station and multiple station smoke detectors: Power for single and multiple station smoke detectors shall be supplied from a permanently wired connection directly to an AC primary source of power. All power for AC powered smoke detectors shall be taken from a single branch circuit which also provides other electrical service to *habitable, occupiable spaces*. The power source shall be on the supply side, ahead of any switches.

3603.16.6 Primary electrical power for other household fire warning systems: Low voltage *household fire warning systems* that include a listed control unit with automatic detectors and occupant notification appliances shall be powered from a permanently wired AC primary power source. Such AC primary power shall be supplied either from a dedicated branch circuit or the unswitched portion of a branch circuit also used for power and lighting of *habitable, occupiable spaces*, in accordance with the requirements of NFPA 72 and 527 CMR 12.00 as listed in **Appendix A**.

3603.16.7 Second electrical power: In addition to required primary power as discussed in 780 CMR 3603.16.5 and 780 CMR 3603.16.6, all household fire warning systems shall have secondary (standby) power supplied from monitored batteries in accordance with the household fire warning equipment requirements of NFPA-72 as listed in **Appendix A**.

3603.16.8 Required alarm notification appliances: Where more than one smoke or heat detector is required by 780 CMR 3603.16.10, all required detectors shall be installed so that the activation of any detector shall cause the alarm in all required smoke detectors in the dwelling unit to sound.

Detector activation in a dwelling unit shall not activate signals in any other dwelling unit or common areas.

3603.16.8.1 Non-required alarm notification appliances: Non-required smoke or heat detectors shall be installed so that the activation of any non-required detector shall cause the alarm in all required and non-required detectors in the dwelling unit to sound.

Detector activation in a dwelling unit shall not activate signals in any other dwelling unit or common areas.

3603.16.9 Alarm signaling intensity: All required alarm-sounding appliances shall have a minimum rating of 85 dBA at ten feet in accordance with the requirements of NFPA 72.

Exception: Sounding appliances directly located in bedrooms shall have a sound pressure levels as low as 75 dBA at ten feet in accordance with the requirements of NFPA 72.

3603.16.10 Required smoke detector/heat detector locations: Smoke detectors shall be installed in the following locations:

1. In the immediate vicinity of bedrooms;
2. In all bedrooms;
3. In each story of a dwelling unit, including basements and cellars, but not including crawl spaces and uninhabitable attics;
4. In residential units of 1200 square feet or more, automatic fire detectors, in the form of smoke detectors shall be provided for each 1200 square feet of area or part thereof;
5. Fixed temperature heat detectors shall be installed in accordance with the requirements of 780 CMR 3603.16.4.

Exceptions:

1. In dwelling units with one or more split levels, (i.e., adjacent levels with less than one full story separation between levels) a smoke detector installed on the upper level shall suffice for the adjacent lower level unless there is an intervening door between one level and the adjacent lower level in which case smoke detectors shall be installed on both levels.
2. In buildings equipped throughout with an automatic sprinkler system, smoke detectors are not required in bedrooms.

3603.16.11 Photo electric smoke detector requirements: Any smoke detector located within 20 feet of a kitchen or within 20 feet of a bathroom containing a tub or shower shall be a photo electric type smoke detector but shall satisfy the compatibility requirements of 780 CMR 3603.16.2.

3603.16.12 Maintenance and testing: It shall be the responsibility of the owner to properly maintain the household fire warning system in accordance with the requirements of NFPA 72 as listed in **Appendix A**.

3603.16.13 Additions, alterations and repairs: When one or more sleeping rooms are added or created in existing dwellings, the entire building shall be provided with smoke detectors designed and located as required for new dwellings.

For other alterations or repairs that would require a fire protection system in an existing building be upgraded, refer to 780 CMR 3404 and/or 780 CMR 3405, as applicable.

DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION

B. ARCHITECTURAL ACCESS BOARD (AAB) SITE FEASIBILITY ASSESSMENT FOR HOMES AND SITE-BASED RESPITE

Introduction and Guide: This assessment is used by the provider to determine if the home meets the intent of DMR regulation **115 CMR 7.07(4)** which states that “providers must assure that a barrier-free environment is provided in those locations used by persons with substantial mobility impairments, to the extent necessary to permit access to the support and services, personal, and common areas.” The following are answers to commonly asked questions about creating barrier-free homes:

What is the basis for the requirements in the AAB Assessment? The items in the enclosed AAB Assessment are based on the regulations of the Architectural Access Board 521 CMR which were promulgated February 23, 1996. A home is deemed to be accessible in whole or in part, if access, space, and fixture specifications are in conformity with the applicable provisions of the Regulations of the Architectural Access Board (521 CMR).

What living situations are required to meet the requirements in this assessment? All homes providing 24 hour or less than 24 hour staffing supports, placement services, and site-based respite must support individuals to live in an accessible home. Where the home is owned or leased by the individual (and where he/she is competent, in fact, of making informed decisions about the living situation) that person may choose not to live in a home that is accessible.

What is meant by “to the extent necessary” in the regulations? The individual must have complete and unrestricted use of all common rooms and areas, to a barrier-free bathroom and to his or her own bedroom. All modifications and adaptations must enable the individual freedom of movement, independence, privacy and safety in his or her living environment. The current and potential abilities and needs of each person must be carefully considered in determining what modifications would be needed in order to create an accessible environment including the person’s current and potential abilities. While one does not want to make unnecessary modifications, it is important that a person’s untapped potential is considered so that the person is not precluded from being as independent in his or her home as new skills are acquired.

DEPARTMENT OF DEVELOPMENTAL SERVICES
QUALITY ENHANCEMENT DIVISION

B. ARCHITECTURAL ACCESS BOARD (AAB) SITE FEASIBILITY ASSESSMENT FOR HOMES

Provider: _____ **Date of Assessment:** _____

Address: _____ **Quality Enhancement Specialist:** _____

NOTE: Those items marked **B** are required for services to individuals with visual impairments, but who are not otherwise physically handicapped.

AAB	Requirement	✓	Comments
	<u>Accessible Route</u>		
20.2	Within the boundary of the property, an accessible route(s) is provided from the parking area, and street or sidewalk to the entrance of the home.		
20.7	Walks, halls, corridors, passageways, aisles, or other circulation spaces have a minimum of 80" clear headroom. If the clearance is less than 80" a barrier is provided to warn blind or visually impaired individuals. (B)		
20.9	An accessible route has a running slope no greater than 1:20. If greater than 1:20 it must meet the requirement for ramps. (See Section on Ramps)		
20.8 29.1	The surface of the accessible route is stable, firm, slip resistant, and maintained with materials that ensure continued slip resistance.		
	<u>Exterior Walkways</u>		
22.2	An unobstructed path of travel is provided which is at least 36" clear, excluding curbstones.		
	<u>Exterior Walkways, cont.</u>		

AAB	Requirement	✓	Comments
22.4 22.4.1	Path/walkway have continuous common surfaces, uninterrupted by steps or changes in level greater than 1/4". Changes in level between 1/4 - 1/2" are beveled with a slope no greater than 1:2. (See figure 22a)		
22.5	Path/walkway surface is stable, firm and is generally a continuous plane with a minimum of surface warping.		
22.6	Grading and drainage is designed to minimize pooling of water or accumulation of ice or flow of water across walkways.		
24.1	<u>Ramps</u> An accessible route with a slope greater than 1:20 is considered a ramp.		
24.2.1	Maximum slope of a ramp is 1:12, measured between any two points on the ramp.		
24.2.2	Maximum rise for any run is 30". (See figure 24a)		
24.3	Minimum clear width of the ramp is 48" (measured between the railings). (See figure 24b)		
24.4	Ramps have landings for turning and resting, located at the top and bottom of the ramp, ramp run, and whenever a ramp changes direction. The maximum length of a ramp between landings does not exceed 30'. (See figure 24c)		
24.4.1	Landings are level and unobstructed by projections and door swings.		

AAB	Requirement	✓	Comments
	<u>Ramps</u> , cont.		
24.4.2 24.4.3	The landing width is at least as wide as the ramp run leading to it. The landing length is a minimum of 60" clear.		
24.4.5	If the ramp changes direction at landings, the minimum landing size must be 60" x 60". (See figure 24c)		
24.5.1 24.5.2	There are handrails on both sides of the ramp. Handrails are provided in pairs, one at between 34 - 38" and the lower one at between 18 - 20", measured from the surface of the ramp to the top of the handrail. (B)		
24.5.3	Handrails are continuous without interruption, except by doorways and openings, so that a hand can move from end to end without interruption. (B)		
24.5.7	The handrail is free of sharp or abrasive elements. (B)		
24.7	Ramp surfaces are stable, firm and slip resistant. (B)		
24.9	Water does not accumulate on the surface of an outdoor ramp. (B)		
25.2	<u>Entrances</u> There is a level space (entrance vestibule) on the interior and exterior of the entrance door.		
25.3	The entrance vestibule is a minimum of 48" plus the width of any door swinging into the space. (See figures 25a & 25b)		

AAB	Requirement	✓	Comments
25.4	<p style="text-align: center;"><u>Entrances</u>, cont.</p> <p>Doormats 1/2" thick or less are securely anchored to avoid tripping. Doormats 1/4" to 1/2" thick are secured with a beveled edge. Doormats thicker than 1/2" are recessed.</p>		
26.5	<p style="text-align: center;"><u>Doors And Doorways</u></p> <p>All accessible doorways and openings have a minimum clear space of 32". A standard 36" wide door with a standard hinge will produce a clear opening of at least 32". (See figures 26b and 26c)</p>		
26.7	Doors in a series swing either in the same direction or away from the space between the doors. (See figure 26g)		
26.10.1	Thresholds do not exceed 1/2" in height and are beveled on both sides.		
26.10.2	Changes in floor finish materials have an edge strip or a beveled threshold.		
26.10.3	Exterior sliding door thresholds do not exceed 3/4" and are beveled on both sides.		
26.11.1	Handles, pulls, latches, and locks on doors are easy to operate with one hand and do not require tight grasping, pinching or twisting of the wrist to operate. When sliding doors are fully open, hardware is exposed and useable on both sides.		

AAB	Requirement	✓	Comments
	<u>Doors And Doorways</u> , cont.		
26.11.2	Hand-operated door opening hardware is located 36 - 48" above the floor.		
26.11.3	Doors can be operated with one hand and a single effort.		
26.11.4	Doors opening into hazardous areas have door-opening hardware that is knurled or has a roughened surface to give tactile warning to people with visual impairments. (B)		
	<u>Stairs</u>		
27.2	On any given flight of stairs, all steps have uniform riser heights and tread widths. (B)		
27.3	Projections on the edge of stairs are no more than 1 1/2". (B)		
27.4.1 27.4.2	There are continuous handrails on both sides of all stairs, that are between 34" and 38" above the tread/riser intersection. (B)		
	<u>Floors</u>		
29.1	Floors, walks and ramps are stable, firm and slip resistant. (B)		
29.2	Floor surfaces are of a common level (up to 1/4").		

AAB	Requirement	✓	Comments
	Floors, cont.		
29.2.2	Changes in level of 1/4" to 1/2" must be beveled.		
29.2.3	Changes in level greater than 1/2" have a ramp, walkway or means of vertical access. (e.g., lifts, elevators) (B)		
29.3.1 29.3.4	Carpeting is high density, non-absorbent, with a maximum pile thickness of 1/2"; if padding is installed, it does not exceed 1/4" in thickness and is secured taut to the floor. (B)		
	<u>Bathroom</u>		
44.2 6.3	The space for a wheelchair to make a 180° turn is a clear space of 60" diameter. (See figures 44a, 6c, 6d)		
44.3	Doors swing out, fold or slide. Doors may swing into the bathroom only if the door does not impede the wheelchair turning space.		
44.4.1	The centerline of the toilet is located 18" from the nearest side wall and at least 42" from the farthest sidewall or closest edge of an adjacent fixture.		
44.4.2	The top of the toilet is 15 - 19" above the floor.		
44.4.3	The flush activator is operable with a closed fist and does not require grasping, pinching, or twisting of the wrist.		

AAB	Requirement	✓	Comments
44.4.4	<p data-bbox="212 1230 245 1461"><u>Bathroom</u>, cont.</p> <p data-bbox="285 873 464 1871">Two grab bars, one 42" long and one 36" long are installed at the toilet between 33 - 36" above and parallel to the floor. The 42" grab bar is mounted on the side wall closest to the toilet, no more than 12" from the back wall. The 36" grab bar is mounted on the back wall 6" from the interior corner and may be located up to 3" above the top of the toilet.</p>	✓	
44.4.5	<p data-bbox="508 873 613 1871">Toilet paper dispensers are located on the side wall closest to the toilet. The centerline of the roll is a minimum of 19" above the floor. Dispensers must permit continuous paper flow.</p>		
44.5.3	<p data-bbox="656 873 721 1871">The sink rim or counter top is 34" from the floor and there is at least 29" of clearance from the floor to the bottom of the sink.</p>		
44.5.4	<p data-bbox="769 1293 802 1871">The sink has a kneespace of 30" in width.</p>		
44.5.5	<p data-bbox="842 873 907 1871">The front edge of the sink or countertop is a minimum of 22" from the back wall.</p>		
44.5.6	<p data-bbox="956 873 1053 1871">All piping under the sink is offset to the back wall so that an individual in a wheelchair has maximum possible kneespace. The piping must be insulated.</p>		
44.5.7	<p data-bbox="1104 873 1169 1871">Faucets can be operated with a closed fist and do not require grasping, pinching or twisting of the wrist.</p>		
44.6	<p data-bbox="1218 873 1315 1871">If more than one bath is provided, one of the bath fixtures is a wheel-in shower; where one bath is provided, it may be a wheel-in shower or bathtub.</p>		

AAB	Requirement	✓	Comments
44.6.1	<u>Bathroom</u> , cont.		
	Bathtubs have the following:		
	Bathtubs are a minimum of 60" long. The rim is between 16 -18" above the floor.		
	There are two grab bars, 48" long, installed on the long wall and parallel to the floor. One is mounted at a height of 21" and one at a height of 36" above the floor.		
	Plastic or fiberglass tubs shall be structurally capable of accepting the installation of a lift that clamps onto the rim.		
	Faucets are operable with a closed fist and do not require grasping, pinching, or twisting of the wrist.		
	Faucets and mixing valves are centered horizontally on the long wall of the tub, 28" above the floor.		
	A hand-held shower head with a flow regulator, attached to a 60" long flexible hose and an adjustable mounting bar, is provided on the long wall of the tub.		
	Sliding doors on bathtubs are not allowed.		
	Soap trays are installed no higher than 48" above the floor to the centerline of the soap tray. Soap trays should not have a hand hold feature.		

AAB	Requirement	✓	Comments
44.6.2	<u>Bathroom</u> , cont.		
	Showers have the following: The showers are the wheel-in type with a minimum of 30" by 60" The long side is fully open. The curb has no more than a 1/2" maximum beveled lip. (See figure 44b)		
	One grab bar, 48" long is located on the long wall at a height of 36" above the floor.		
	Faucets are operable with a closed fist and shall not require grasping, pinching, or twisting of the wrist.		
	Mixing valves are centered horizontally on the long wall. The centerline of the control is mounted 38" to 48" above the shower floor.		
	A hand held shower head attached to a 60" long flexible hose and an adjustable mounting bar 36" long is on the long wall. The bottom of the mounting bar shall be located at 40" above the shower floor.		
	Soap trays are installed no higher than 48" above the floor to the centerline of the soap tray. The soap tray should not have a hand hold feature.		
44.7 5.83	Where there are grab bars, they are non-rusting and slip resistant, are between 1 1/4" and 1 1/2" in outside diameter, and are located 1 1/2" clear from the wall. Grab bars do not rotate within their fittings.		

AAB	Requirement	✓	Comments
	<u>Bathroom</u> , cont.		
44.8.1 44.8.2	A mirror is located with the bottom no more than 40" above the floor and the top no less than 72" above the floor.		
44.9	The medicine cabinet is installed with its inside bottom surface at a height of 40" above the floor.		
	<u>Kitchen</u>		
45.2	A clear floor space is provided in front of appliances which have no kneespace (e.g., wall ovens, refrigerators).		
6.4.1	Minimum clear floor space for a single one rise wheelchair is 30" x 48".		
45.3 6.3	Turning space permits a person using a wheelchair to turn around without coming into contact with fixtures. 180° turn is 60" diameter or an L-shaped space. (See figures 6c and 6d)		
45.4.2	A clear kneespace is provided under the sink, 22" deep and at least 30" wide.		
45.4.4 45.5.4 45.10.2	A counter space at least 15" wide is provided on one side of the sink or cooktop on the refrigerator, at the same height as the sink or cooktop.		
45.4.5	Sink bowls do not exceed 6 1/2" in depth. Drains are offset to the rear.		

AAB	Requirement	✓	Comments
45.4.6 45.4.3	<p><u>Kitchen</u>, cont.</p> <p>Water pipes and drain traps are located as close to the rear wall of the knee-space underneath the sink and as high off the floor as possible to provide maximum knee-space. If there is no base cabinet under the sink, pipes are insulated or covered. The kitchen sink is 29" from the floor to the underside of the sink.</p>		
45.4.7	<p>If a garbage disposal has a remote switch, it is located on the front face (apron) of the counter located to the left or right of the sink but not in front of the sink.</p>		
45.4.8	<p>Faucets are operated by a single lever. A spray hose is provided.</p>		
45.5.2 45.5.3	<p>A clear knee-space is provided under the cooktop, 22" deep and at least 30" wide, with at least 29" from the floor to the underside of the cooktop.</p>		
45.5.5	<p>Cooktop controls are located at the front or side of the appliance. If the controls for the exhaust hood are located higher than 54" above the floor, a switch is provided at the front of counter.</p>		
45.6.1	<p>The bottom of the oven is 30" above the floor.</p>		
45.6.2	<p>The oven is self-cleaning or continuous cleaning.</p>		
45.6.4	<p>Where a bottom-hinged oven door is provided, a retractable "bread board" type shelf is provided in the counter immediately adjacent to the oven door. Where a side-hinged oven is provided, the retractable "bread board" type shelf is provided directly under the oven.</p>		

AAB	Requirement	✓	Comments
	<u>Kitchen</u> , cont.		
45.7	Wall cabinets are 48" from the floor to the inside bottom of the cabinet.		
45.9.1	Opening devices on cabinets do not require twisting, pinching or grasping to operate.		
45.9.2	Opening devices are located at the tops of base cabinet doors and the bottom of wall cabinet doors.		
45.10	The refrigerator may be a refrigerator- freezer with two doors side by side, or it may be a two door freezer-above-the- refrigerator unit, provided the floor of the freezer is no higher than 44" above the floor. The refrigerator is self-defrosting.		
45.10.1	The refrigerator is located so that its doors are capable of being opened 180°.		
	<u>Bedroom</u>		
47.1 6.3	Bedrooms provide a wheelchair turning space of 180° and have a <i>clear</i> space of 60" in diameter or a T-shaped space. The wheelchair turning space is clear of the door swing and located at one side of the bed. (See figures 6c and 6d)		
47.3 9.5.9	The individual can reach all parts of the closet.		

AAB	Requirement	✓	Comments
40.1	<p align="center"><u>Alarms</u></p> <p>Both audible and visual alarms are used in homes serving individuals who are deaf or hard of hearing or blind, as appropriate.</p>		
8.6.1 40.3	<p align="center"><u>Visual Alarms For Individuals Who Are Deaf Or Hard Of Hearing</u></p> <p>All common spaces, rooms and bedrooms are equipped with visual alarms (strobe lights).</p>		
8.6.1 40.3.1	Visual alarms are connected to the building emergency alarm system.		
8.6.1 40.4.1	Visual alarms are visible from all areas of the room.		
8.6.2	<p align="center"><u>Visual Notification Devices</u></p> <p>Visual Notification Devices are provided in all common areas, rooms and bedrooms to alert individuals of incoming telephone calls and a door knock or doorbell.</p>		
39.1	<p align="center"><u>Outlets and Controls</u> (e.g., light switches, thermostats)</p> <p>Controls and operating mechanisms are accessible.</p>		
39.3.1	Electrical and communication systems receptacles on walls are mounted between 15" - 48" above the floor.		
39.5 39.4	Controls and operating mechanisms are operable with one hand and do not require grasping, pinching or twisting of the wrist.		

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
C. SITE FEASIBILITY REPORT**

Provider: _____

Proposed Address: _____

Capacity of the Home: _____

Type of Home (e.g., Single Family) _____

Potentially Feasible ☐ Not Feasible ☐

Area	Comments
Living Room, Den or Other Activity Room	
Kitchen, Pantry and Dining Room	
Bedrooms	
Bathrooms	
Interior Stairways, Hallways and Foyers	
Fire Protection Systems	
Attic, Basement, Laundry and Storage Areas	
Heating Equipment	
Exits and Exterior Stairways	
Exterior and Yard	
AAB Requirements	

Comments: _____

If you are planning to proceed with this location, please be aware that a Pre-Placement Review and an Approval to Occupy must be conducted prior to individuals moving into the home. It is also the provider's responsibility to obtain a building permit if renovations are to be made. A Safety Plan will need to be developed and have the Area Office's approval and signature.

Quality Enhancement Specialist _____ Date: _____ Attachments: ☐ ☐
Yes No

cc: Area Director

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
D. PRE-PLACEMENT REQUIREMENTS CHECKLIST FOR THE HOME**

Provider: _____ Address: _____ Capacity of the Home: _____

General requirements that must be met before individuals move to the home:	Yes	No	Comments
1. Certificate of Occupancy or approval has been obtained from Building Inspector where there has been renovations.			
2. Requirements of the Site Feasibility Assessment have been addressed.			
3. Heat/Smoke/Fire Alarm (as applicable) is operational.			
4. Co detectors are present.			
5. A fire extinguisher, inspected within the last year is in the kitchen.			
6.. First Aid supplies are in place.			
7. Heating system is functional (current inspections).			
8. Plumbing system is operational (adequate water pressure, hot water temperature between 110 and 130 degrees).			
9. Screens are in place during the warm weather.			
10. Electrical work is complete and operational.			
11. Telephone is functional. The telephone(s) is located in an area where individuals can have privacy.			
12. Kitchen and bathroom(s) are ready for use. Stove and refrigerator are in place and operational.			
13. Approaches to building are safe - walkway, stairways, porches, etc.			
14. Each required egress is usable.			
15. Furniture and bedding are in place.			
16. Home appears to be in a safe and sanitary condition.			
17. There is adequate staff (including overnight) to meet individual needs. (Refer to the DDS regulations)			
18. A search plan is in place.			
19. A location-specific Safety Plan is in place (provider and Area Director have signed the Assurance Form).			
20. An Emergency Fact Sheet is in place for each individual.			
21. Each individual taking medication has required medication information in place.			
22. The site is registered with DPH if staff will be dispensing medication.			
23. Staff who will be dispensing medication have current MAP certifications.			

QE Specialist: _____

Date: _____

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
E. FIRE DRILL REPORT**

Date: _____ Time: _____ AM ____ PM ____

Provider: _____

Address of Home: _____
include Apt/Unit # if applicable

Name of staff on duty: _____ # Asleep: _____ # Awake: _____

Capacity of the Home: _____ Individuals not present at time of drill: _____

Individuals not asleep at time of drill: _____

Exit blocked? _____ Which one(s): _____

Individual's Name (Initials Only)	Evacuation Time	Type of Assistance (independent, verbal, gestural, tactile, physical)	Location of Bedroom	Non-Ambulatory	Adaptive Device(s)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

Comments:

Staff Signature

QE Specialist Signature

cc: Provider File

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
F. APPROVAL TO OCCUPY FOR THE HOME OR SITE-BASED RESPITE**

To: _____

Provider: _____

From: _____

Date: _____

The ☐ home ☐ Site-Base Respite to be located at _____
was assessed for compliance with applicable DMR Requirements.

- ☐ The home is now suitable for individual placement. This constitutes your
Approval to Occupy.

Comments: _____

- ☐ The home is not suitable for individual placement until the following corrections
are made:

Signed by: _____ QE Specialist: _____ Date: _____
Agency Representative/Title

Correction Confirmation (When home was not suitable for individual placement):

Site Visit ☐ Written (attached) ☐ Other ☐

The home is now suitable for individual placement.

QE Specialist: _____ Date: _____

NOTE: An Approval to occupy is neither a Certification nor a Certificate of Occupancy.

Site Feasibility and Approval to Occupy for Work/Community Supports

Introduction and Purpose

Site Feasibility and Pre-Placement review is conducted to determine if a proposed location for a work/community support offers a safe and suitable environment for individuals before it can be occupied. The review is designed to provide technical assistance to providers and DDS Area/Regional Staff by identifying any features affecting the well-being of individuals that would need to be addressed before the location can be occupied.

The role of the Quality Enhancement Division (QED) is to support both the provider and DDS Area/Regional Office when they are relocating and opening a location where work/community supports will be provided. Therefore, it is important that QED be involved early in the decision to relocate or open a new location by conducting the **Site Feasibility Assessment** of the potential location(s) before it is based or purchased by the provider.

The **Pre-Placement Review** is conducted when the work/community support location is ready for Occupancy in order to issue an **Approval to Occupy**. An Approval to Occupy must be issued before the building can be used by individuals.

Applicability of Site Feasibility and Approval to Occupy Requirements

For the purpose of these procedures, Site Feasibility and Approval to Occupy is required if individuals work or do other activities at a location that is owned or operated by the provider.

Supported employment situations, where the individuals work at a location that is not owned or operated by provider are not subject to these procedures.

Site Feasibility

1. The Regional or Area Director is responsible for notifying the provider that approval from the Quality Enhancement Division is required by DDS before a final selection of property is made. This approval should precede a purchase of a property or signing of a lease.
2. As soon as a potential location is identified, the provider contacts the Regional Quality Enhancement Director who is responsible for the city or town where the work/community support will be located.
3. The QE Director assigns a Quality Enhancement Specialist to conduct a **Site Feasibility Assessment (Forms A and/or B)** of the potential location.
4. As a result of the assessment, the QE Specialist determines if the location is either not feasible or potentially feasible. If the location is potentially feasible and the provider decides to proceed, the QE Specialist issues a **Site Feasibility Report (Form C)** listing any modifications or other requirements that must be completed prior to occupancy. During this time the provider applies to the Local Building Authority for the applicable Certificate of Occupancy and building permits. It is critical that the provider contact the building inspector early in the process, since the environmental requirements for the location will be dependent upon the identified "Use Group" in the Massachusetts State Building Code (CMR 780).

Approval to Occupy

1. Once the provider has made all necessary, renovations, repairs, and all needed furniture and equipment are at the work/community support location, the QE Specialist completes the **Pre-Placement Checklist (Form D)** to verify that the location meets all requirements and to documents any items that must be completed before an **Approval to Occupy (Form E)** is issued.
2. There may be circumstances when the Approval to Occupy cannot be issued. In these instances the Approval to Occupy form will list the issues to be corrected and the QE Specialist will follow-up to verify that corrective action has been taken. Once corrected, the Approval to Occupy will be finalized. Final Approval to Occupy is solely a Quality Enhancement function and is not the prerogative of any local building, health or other official. However, documentation of local authority approval (e.g., fire, building, health) for any renovations or uses (e.g., cafeteria) is required and must be available at the Pre-Placement Review.
3. Once the entire process is completed, the QE Specialists sends the data sheet and a copy of the Approval to Occupy to the Director of Licensure and Certification. The data is entered in Central Office and a copy of the datasheet is sent to the Regional Office that conducted the review and, when needed, to the “host” region for the survey and certification of the provider.

**DEPARTMENT OF DEVELOPMENTAL SERVICES
QUALITY ENHANCEMENT DIVISION**

A. SITE FEASIBILITY ASSESSMENT FOR WORK/COMMUNITY SUPPORTS

* This Assessment is based on the State Building Codes (B); Sanitary Codes (S); and the DMA Regulations.

QE Specialist: _____

Provider: _____ Proposed Address: _____ Date: _____

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(B) 1205.1	<u>Work Area/Building</u> Lighting is adequate for individuals.	<ul style="list-style-type: none">• There is artificial or natural lighting for individuals to complete work assignments.• Corridors, hallways, and offices have natural artificial or lighting.• Where there are no windows, there are emergency lights.		
(S) 410.280	Ventilation is adequate for individuals.	<ul style="list-style-type: none">• Where there are windows that are being used for ventilation, they can be easily opened to enable fresh air to come into the building.• Where there are no openable windows, there is a mechanical ventilation and air conditioning system.		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(S) 410.501	<u>Work Area/Building.</u> cont. Windows and doors are weather tight and in good repair.	<ul style="list-style-type: none"> • Windows are in good repair (e.g., no cracked or broken window panes, has weather-stripping to prevent cold air from leaking in when moved). • Windows can be opened easily (e.g., no broken sash cords). • Doors can be opened easily (including by people in wheelchairs when needed). • Doors are free from cracks, holes, or broken glass. • Locks can be opened easily (no 2-way dead bolt locks). 	✓	
(S) 410.500	Ceilings, floors and walls are in good repair.	<ul style="list-style-type: none"> • Ceiling and walls do not show evidence of leaking or water damage. • Ceiling panels are not missing or cracked. • Floor appears to be structurally sound. • No holes or worn floor boards. • No crack, loose or broken tiles or linoleum. 		
	Doors and windows needed for ventilation have screens.	Screens are used during the warm weather months. In certain situations where door or window screens are impractical, this requirement may be waived with adequate justification (e.g., building that is air conditioned).		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(S) 410.250 (B)	<u>Kitchen, Lunchroom, And Cafeteria</u> Kitchen contains at least one electric light fixture and two wall type outlets in good repair.	<ul style="list-style-type: none"> • There is adequate lighting for intended use. • There are enough wall outlets for intended use. 	✓	
(S) 410.100	Sink is free from visible leaks, clogging and loose or cracked pipes.	Sink is easily cleanable (no worm, cracked, or pitted areas).		
(S) 410.180	There is sufficient water pressure to both hot and cold water fixtures.	<ul style="list-style-type: none"> • QE Specialist should check each water source. • QE Specialist may require documentation of a plumbing inspection. 		
(S) 410.550	The area is free from rodents, cockroaches and insect infestation.			
(S) 410.509	<u>Bathroom(s)</u> Floors and walls up to a height of 48" are constructed of non-absorbent material that is easily cleanable.	<ul style="list-style-type: none"> • Floors made easily cleanable materials (e.g., tile, linoleum). • Wood floors are finished with a non- absorbent coating. • Walls are easily cleanable (e.g., wallpaper, tile, washable). • Walls and floors are in good Repair (e.g., no holes, cracks). 		
(S) 410.180	There is sufficient water pressure to both hot and cold water fixtures.	<ul style="list-style-type: none"> • QE Specialist to check each water source. • QE Specialist may require documentation of a plumbing inspection. 		
(S)	Each bathroom contains at least 1 electric light	There is adequate lighting for the		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
410.252	fixture in good repair.	entire bathroom, including toilet stalls.		
(S) 410.150 (D)	Toilet(s) and washbasin(s) are free from visible leaks, clogging and loose or cracked pipes.	Toilets and washbasins are easily cleanable (no worn, cracked or pitted areas).		
(S) 410.200	<u>Bathrooms</u> (cont.) If there are no openable windows, then mechanical ventilation is provided.			
(S) 410.150 (B)(3)	If the bathroom contains more than 1 toilet, each toilet has walls or partitions which afford privacy.	Walls or partitions must include a door for privacy.		
	There must be the following number of toilets: 1 - 15 employees 1 toilet 16 - 35 2 36 - 55 3 56 - 80 4 81 - 110 5 111 - 150 6 Over 150 1 additional toilet fixture for each additional 40 employees	<ul style="list-style-type: none"> • "Employees" include individuals and staff. • Requirements of the Federal Occupational Health and Safety Administration of U.S. Department of Labor (OSHA). 		
	<u>Interior Stairways And Hallways</u> All stairways are in good repair; treads, risers and railings are safe.	<ul style="list-style-type: none"> • Railings are secure. • Balusters are not missing. • If wood railing, the surface is smooth; if metal it is free from rust. • Floor boards not broken or rotting. • Width and height can be used safely. 		
(S) 410.503	Railings have balusters placed at no more than six inches apart.	If constructed or replaced <u>on or after August 27, 1997</u> , the spacing		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(D)		is no greater than 4 ½ inches.		
	All stairways are unobstructed.	<ul style="list-style-type: none"> There is no obstructions to prevent free access to stairs. 		
	Every stairway has a secure handrail on one side at least 36" high and in good repair.	May need hand rails on both sides depending on needs of individuals.		
(S) 410.253	All hallways, passageways, foyers and interior and exterior stairways are provided with light fixtures in good working order and reasonable use.	There is adequate lighting for safe use.		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(B)	<u>Fire Prevention Systems</u>	The type of fire prevention system required will depend on the designation "Use Group" in the State Building Codes.		
(DDS) 7.07(3)	<u>Smoking Areas</u>	For smoking areas the following applies: <ul style="list-style-type: none"> • The smoking areas is remote from other commonly used areas of the building. • Metal ashtrays are used. • Flammable or combustible materials are not located in or near the smoking area. 		
(S) 410.200(A)	<u>Heating And Electrical Equipment</u> Heating equipment is adequate and operational.	QE Specialist may require documentation from an authorized service representative.		
(S) 410.255	Electrical service (amperage) is sufficient to meet the intended use (for the type of equipment planned to be used by individuals and staff).	QE Specialist may require documentation from a licensed electrician.		
(S) 410.256	There is no electrical wiring passing across frequently traveled floor areas, passing under floor coverings such as rugs or mats, or extending through doorways or other openings.			

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
	<p><u>Heating And Electrical Equipment</u>, cont.</p> <p>All wall receptacles, conduit boxes and/or other sources of electricity are covered.</p>	<ul style="list-style-type: none"> • Electric outlets are not missing pieces such as light switch wall plates. • Circuit breakers and fuse boxes are enclosed. • Wiring is not exposed. 		
(S) 410.353	<p><u>Asbestos</u></p> <p>All asbestos material is maintained properly, in accordance with the State Sanitary Code.</p>	<ul style="list-style-type: none"> • Asbestos is not exposed (especially around pipes and the heating system.) • QE Specialist may require documentation from the Local Health Inspector). 		
	<p><u>Entrances, Exits, And Exterior Stairways</u></p> <p>Each floor has at least 2 usable exits.</p>	<ul style="list-style-type: none"> • There are 2 exits from each floor. Elevators are not considered a means of egress in an emergency. • Stairways and other means of egress (e.g., fire escapes) can be safely used by individuals. 		
410.503(A)	Each exterior stairways has a secure handrail on one side that is in good repair.			
(S) 410.501	<p><u>Exterior (In Free-Standing Buildings)</u></p> <p>There is no evidence of leaks in the foundation or exterior walls.</p>	<ul style="list-style-type: none"> • There is no water stains or standing water in the basement. 		
(S) 410.505	Exterior of building is in safe condition.	<ul style="list-style-type: none"> • QE Specialist may require documentation of inspection from the Local Building Inspector. 		

REG. REF.	REQUIREMENT	GUIDELINE	✓	COMMENTS
(DDS) 7.07(5)(b)	<p><u>APPEARANCE, DESIGN AND LOCATION</u></p> <p>The work/community support is located in a business district whose general design features do not emphasize the services separateness or difference. Individuals have access to the same community services and resources used by other people (e.g., cafeteria, restaurants, banks).</p>			

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY ENHANCEMENT**

B. AAB SITE FEASIBILITY ASSESSMENT

Work/Community Supports

QE Specialist: _____

Provider: _____ Proposed Location: _____ Date: _____

115 CMR 7.08. A barrier-free environment shall be required in locations providing supports and services by the Department and used by persons with substantial mobility impairment, in the extent necessary to permit access to the supports, services, personal, and common areas.

The following check list is based on the regulations of the Architectural Access Board, **521 CMR, 2.00 and 3.00**. It must be used for a new work/day service intending to serve "physically handicapped persons" as defined in Massachusetts General Law, **Chapter 22, Section 13A:** " Physically handicapped person, a person confined to a wheelchair; a person who, because of the use of braces or crutches or because of the loss of a foot or leg, or because of an arthritic, spastic, pulmonary or cardiac condition, walks with difficulty or insecurity; a person who, due to a brain, spinal or peripheral nerve injury, suffers from faulty coordination or palsy; a person who is blind or whose sight is so impaired that, functioning in a public area, he is insecure or exposed to danger; a person whose hearing is so impaired that he is unable to hear warning signals; and a person whose mobility, flexibility, coordination, and perceptiveness are significantly reduced by aging."

This checklist will also be used for an existing work/day service which, not previously having served persons with mobility impairment, now wishes to do so.

Note: Those items marked "B" are required when providing services to individuals with visual impairments, but who are not otherwise physically impaired.

AAB CODES	REQUIREMENT	✓	COMMENTS
	<u>Site Access</u>		
20.2	Area to disembark from vehicles is provided at an accessible entrance.		
20.3	Topography or grounds are graded level at each entrance.		
22.2	Path/walkway is safe and uninterrupted by steps or abrupt changes in level greater than 1/2 inch.		i.e. Route of travel from van to entrance door.
22.3	Path/walkway is of a non-slip surface and finish material.		
	<u>Ramps</u>		
25.2	Slope of each ramp does not exceed 1:12.		i.e. For every foot of height from grade, the ramp must be 12' in length.
25.3	Ramps are not less than 48" wide, measured at railings.		
25.4	There are handrails on both sides of the ramps in pairs, one at a height of 34" and the lower one at a height of 19" measured vertically from the surface of the ramp.		
25.4	Handrails extend 12" beyond top and bottom of ramp, but need not so extend if it would cause a safety hazard.		
25.5	Ramps are of a non-slip surface. (If carpeted, carpet is unpadded and secure.)		

AAB CODES	REQUIREMENT	✓	COMMENTS
25.6	<p><u>Ramps</u>, cont.</p> <p>Ramps have level platforms for turning and resting, which are 48" minimum, unobstructed by door swings, entrances, or other projections. Such platforms occur at intervals not exceeding 32', wherever a ramp changes direction, and at top and bottom of ramp.</p>		
26.2	<p><u>Entrances</u></p> <p>Approach to the entrance is a paved walk or ramp with a non-slip surface.</p>		
26.5	Doormats less than 1/2" thick are generally anchored.		
26.5	Doormats thicker than 1/2" are recessed. Grates have maximum openings of 1/2 inch.		
26.6	Obstacles do not impede the path of travel. There are no objects less than 80" above the floor protruding into entrance ways (e.g., suspended lights, signs, door closets).		
26.7	Any entrance not accessible by individuals in wheelchairs has a sign clearly indicating the location of the accessible entrance.		
27.2	<p><u>Doors</u></p> <p>All doors are at least 36" wide and provide an opening at least 34" wide.</p>		
27.7	Exterior thresholds do not exceed 1/2" in height, developed in both sides. Interior thresholds are flush with floors.		
27.9	Hand operated door opening hardware is centered 36" - 42" above floor. All door hardware is operable with a closed fist.		

AAB CODES	REQUIREMENT	✓	COMMENTS
27.11	<u>Doors</u> , cont. Egress doors open with one hand and a single effort.		
27.11	Doors in the path of ingress open with one hand and a single effort.		
27.12	Doors opening into hazardous areas (furnace rooms, loading platform, stairs) are clearly marked; for visually-impaired persons, the doors have roughened or knurled surfaces on door opening hardware to give a tactile warning.		
28.2	<u>Stairs</u>		
	There are no tread projections on the edge of the stairs.		
	Stairs do not have open risers on backs.		
28.3	There are handrails on both side of stairs 34" above front tread-riser intersection.		
28.6	Stair treads have a non-slip surface.		
29.2	<u>Floors</u>		
	Floors in the means of egress have a non-slip surface.		
	Carpets are taut, securely anchored and of a material to minimize tripping.		
29.3			
30.1	<u>Bathroom</u> In each toilet room at least one toilet and sink is accessible by persons in wheelchairs, or an accessible private lavatory, usable by either sex, is provided.		
30.3	<u>Bathrooms</u> , cont.		

AAB CODES	REQUIREMENT	✓	COMMENTS
	The toilet room has a minimum clear space of 60" in diameter, measured 12" above the floor. This is to allow enough room for turning and transfer.		
30.4	Sink is wall-mounted no more than 32" high and must extend 22" from wall or is counter type with clear open knee space of 30" in width and at least 27" in height to the bottom of the counter.		
	Exposed drains or pipes are recessed, insulated, or guarded.		
	There are no knob-type faucets. Lever handle faucets are operable with a closed fist.		
30.5	For bathrooms with individual stalls, at least one toilet stall is a minimum of 60" wide and 72" deep.		
30.5.2	Toilet stall door is 36" wide and swings out or slides.		
	Toilet stall door has self-closing hinge and a pull device to assist in closing the doors.		
	Toilet stall door lock is approximately 36" above floor.		
30.5.3	Toilet is located 18" from nearest wall and at least 42" from farthest wall.		
	Toilet has a seat 17" to 19" above the floor to the top of the seat.		
30.5.4	There are two grab bars on the back wall and one on the side wall.		
31.1	<u>Showers - If Present</u> Showers can accommodate both wheel-in and transfer case.		

AAB CODES	REQUIREMENT	✓	COMMENTS
31.2	Shower stall is 36" by 60" minimum, with a 36" door opening.		
31.3	Shower floor is pitched to drain and is of non-slip surface.		
31.4	Shower operates by a single control lever.		
31.5	Shower stall includes a hinged padded seat, at least 16" deep.		
31.6	There are two horizontal grab bars approximately 36" above floor line in shower stall.		

AAB CODES	REQUIREMENT	✓	COMMENTS
33.1	<u>Kitchen</u> - If Present And Used By Individuals The kitchen is of sufficient size to allow individuals in wheelchairs to use all kitchen facilities.		
	There is a clear space in the kitchen not less than 60" in diameter, measured 12" above floor.		
	Counter top contains a sink and cooking unit 30" to 40" above floor.		
33.1.1	There is at least 15" counter space on at least one side of cooking unit.		
	Cooking unit is in-counter type with controls at front.		
	There is open access space for the knees and feet of wheelchair users under the counter containing cook top and sink.		
33.1.7	Oven is wall-type with bottom of door approximately 30" above floor.		
	Oven door may be either side-hinged or bottom-hinged.		
	Sink depth does not exceed 6" .		
33.1.6	Plumbing pipes are recessed, insulated or guarded.		

DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
C. SITE FEASIBILITY REPORT

Provider: _____

Proposed Address: _____

Intended Capacity: _____

Employment Supports ☐ Community Supports ☐

Potentially Feasible ? Not Feasible ?

Area	Comments
Interior	
Kitchen, Lunchroom and Cafeteria	
Bathroom(s)	
Interior Stairways and Hallways	
Fire Protection Systems	
Smoking Areas	
Heating and Electrical Systems	
Asbestos	
Entrances, Exits, and Exterior Stairways	
Exterior (Structural)	
AAB Requirements	

Additional Comments: _____

If you are planning to proceed with this location, please be aware that a Pre-Placement Review and an Approval to Occupy must be conducted prior to occupancy. It is also the agency's responsibility to obtain a Certificate of Occupancy or Certificate of Inspection from the local Building Authority. A Safety Plan will need to be developed with the Area Office's approval and signature.

Quality Enhancement Specialist _____ Date: _____ Attachments: ☐ ☐

Yes No

DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
D. PRE-PLACEMENT REQUIREMENTS CHECKLIST FOR
WORK/COMMUNITY SUPPORTS

Provider: _____ Address: _____ Intended Capacity: _____

General requirements that must be met before individuals attend in the work/community support	YES	NO	Comments
1. Certificate of Occupancy for applicable Use Group has been secured from Building Inspector. Board of Health, Local Fire Authority approvals have been obtained as applicable.			
2. Requirements of the Site Feasibility Assessment are met.			
3. Fire protection system (as applicable) is operational. (Either test system or verify current inspection).			
4. First-Aid supplies are in place.			
5. Heating system is functional (current inspection).			
6. Plumbing system is operational (adequate water pressure).			
7. Ventilation is in place. Screens are in place for windows used for ventilation.			
8. Electrical work is complete and operational.			
9. Telephones are functional.			
10. Bathrooms and kitchen (where applicable) are ready for use. (e.g., soap dispenser, paper towels).			
11. Approaches to building are safe-(e.g., walkway, stairways, ramps, exit lights.)			
12. Each required egress is usable.			
13. Premises appear to be in safe and sanitary condition.			
14. A Search Plan is in place.			
15. A location-specific safety plan is in place (provider and Area Director signed the Assurance Form).			
16. Emergency Fact Sheets are in place (Review a sample).			
17. AAB Requirements are met (if applicable).			
18. Medication administration system is in place if the provider is or intends to become registered with DPH.			

Quality Enhancement Specialist: _____ Date: _____

**DEPARTMENT OF DEVELOPMENTAL SERVICES
OFFICE OF QUALITY MANAGEMENT, QUALITY ENHANCEMENT DIVISION
E. APPROVAL TO OCCUPY FOR THE EMPLOYMENT/COMMUNITY SUPPORT**

To: _____ Provider: _____

From: _____ Date: _____

The Employment Support ☐ Community Support ☐ to be located at _____
was assessed for compliance with applicable DMR Requirements.

- ☐ The work/community support is now suitable for individual placement. This constitutes your **Approval to Occupy**.

Comments: _____

- ☐ The work/community is not suitable for individual placement until the following corrections are made:

Signed by: _____ QE Specialist: _____ Date: _____
Agency Representative/Title

Correction Confirmation (When work/day support was not suitable for individual placement):

Site Visit ☐ Written (attached) ☐ Other ☐

The work/community support is now suitable for individual placement.

QE Specialist: _____ Date: _____

NOTE: An Approval to Occupy is neither a Certification nor a Certificate of Occupancy.

APPENDIX L

Residential Development Form

Please make copies as needed

Indicate all projects that will coincide with the start and completion of the project contemplated by this RFP

Name of Applicant:

1. Type of Project:
a. N = New Construction
S = Substantial Rehab
M = Moderate Rehab
b. H = 1-4 Family House
C = Co-op/Condo

2. Role Played
D = Developer
B = Builder
GC = General Contractor
F = Provided Financing, Inactive
O = Other (please specify on attached page)

3. Status
P = Pre-development
I = In Construction
M = Marketing
C = Completed

2. N = New Construction

Hj = Moderata Riksdag

C = Co-entangled

.....

D = Developer

GC = General Cerebral

O = Other (please specify)

P = Pre-development

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Contents

APPENDIX M

Current Workload Form

Appendix M - Current Workload Form
DEVELOPMENT TEAM MEMBER CURRENT AND RECENT PROJECTS WORK LOAD

For each team member listed, list real estate projects currently underway or initiated in the past 5 years. This form is for team member (name):

Name and Address of Project	Type of Project and Status ¹	Funded Activity ²	Size and Cost of Project ³	Actual or Anticipated Date of Completion	Financing and Subsidies ⁴	Team Member's Role

1. Indicate the type of project, for example: rental, supportive housing, home ownership, or mixed use.
2. Indicate the activities proposed (all that apply): acquisition, new construction, substantial rehabilitation, moderate rehabilitation, and/or financial restructuring.
3. Indicate the number of affordable units, number of market-rate units, total square footage, and total development cost (actual or estimated).
4. List up to 4 names of primary funders (including DHCD if applicable) & for each funder, the type of funding provided: grant, market-rate loan, below-market-rate loan, equity investment

APPENDIX N

Beneficial Interest Form

None of the persons listed in this section is an official elected to public office in the Commonwealth of Massachusetts except as noted below:

Name

Title or position

_____	_____
_____	_____

5. This section must be signed by the individual(s) or organization(s) entering into this real property transaction with the public agency named in item 1. If this form is signed on behalf of a corporation, it must be signed by a duly authorized officer of that corporation.

The undersigned acknowledges that any changes or additions to item 4 of this form during the term of any lease or rental will require filing a new disclosure with the Division of Capital Planning and Operations within 30 days following the change or addition.

The undersigned swears under the pains and penalties of perjury that this form is complete and accurate in all respects.

Signature: _____

Printed Name: _____

Title: _____

Date: _____

(This form contains a disclosure of the names and addresses of all persons with a direct or indirect beneficial interest in the real estate transaction described above. This form must be filed with the Massachusetts Division of Capital Planning and Operations, as required by M.G.L. c. 7, section 40J, prior to the conveyance of or execution of a lease for the real property described above. Attach additional sheets if necessary.)

APPENDIX O

Tax Compliance Form

APPENDIX O

CERTIFICATE OF TAX COMPLIANCE

Pursuant to M.G.L. Chapter 62C, Section 49A, the undersigned certifies under the penalties of perjury that, to the best of my knowledge and belief, the vendor has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature

Name of person signing submission

Title of officer signing for firm, if applicable

Name of business, if applicable

Address

Signature of all firm's partners, if applicable

APPENDIX P

Non-Collusion Form

APPENDIX P

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this submission has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, “person” shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Signature

Name of person signing submission

Title of officer signing for firm, if applicable

Name of business, if applicable

Address

Signature of all firm’s partners, if applicable